

North Carolina Department of Transportation



ITP.00242 PDEA TRACKING UPGRADE

Training Materials & User Documentation

For the new PDEA ETRACS application

Version 1.1

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Project Information

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Ver	Date	Description
1.0	9/11/2015	Original version of the document
1.1	4/8/2016	Completed documentation of V1 functionality

Outstanding Items

This is an initial draft. The document will be completed iteratively, as is the ETRACS application, over the course of the project.

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1 Introduction

The goal of the ETRACS application is to provide a single application for both internal and external users to request work from the HES and NES groups, as well as provide work-request-tracking capability to the PDEA GIS analyst. This will facilitate communications, save time, and save cost for PDEA.

ETRACS will track work to completion. Communications and information-sharing between the groups will be facilitated by auto-generated notifications, regular status reminders, and reports.

User roles will be implemented to provide robust user access and streamline the workflow.

New interfaces between the ETRACS application and STaRS will provide automatic data population for standard EIR requests and allow milestone completion updates from the application back to STaRS. Data-sharing among ETRACS, STaRS, BSIP and other relevant systems provides access to the most relevant and up-to-date information.

The use of a mobile platform will provide access to data and allow real-time data entry and reporting during field studies and meetings for engineers/consultants in the field.

2 Before You Begin

The material in this section is intended to provide a brief overview of the basic ETRACS functionality, as well as provide some useful tips to help you navigate through the application. The functions that you will use in ETRACS will be covered in later sections. For now, just get accustomed to the “look and feel” of the application so that you will be comfortable using it.

2.1 Understand User Roles

All user roles will be defined in the existing DOT WebRoles application, and system access will be provided based on the user role. Following is a brief introduction to user roles.

User Tip: If you have any difficulty performing your work, ask your ETRACS Administrator (NES or HES) to check your role and the groups you are assigned to. You are probably experiencing an error in your role definition, not a system problem. You can (and will) have multiple roles, based upon the work you do. Refer to the following table.

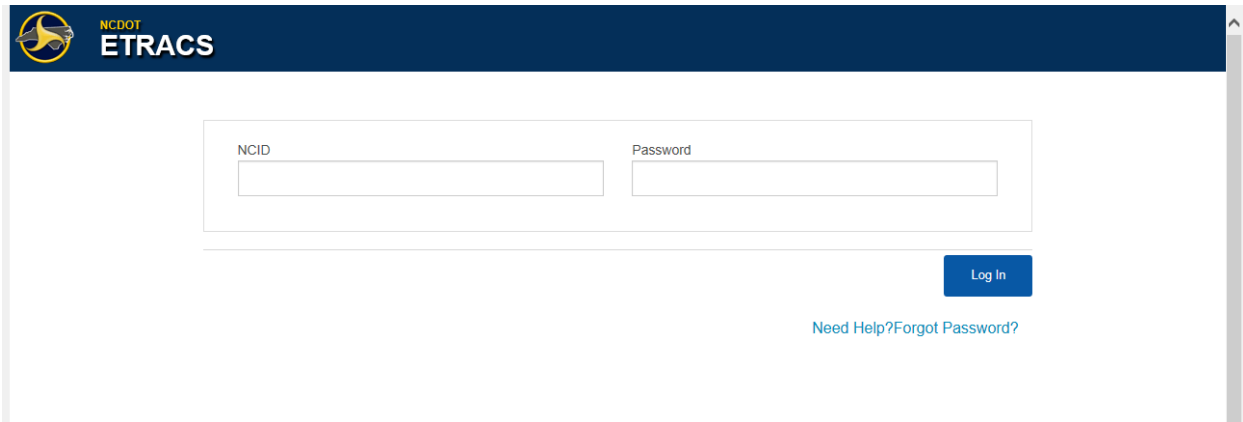
Role	Functions
Internal Requestor	<p>Creates requests</p> <p>Manages work requested:</p> <ul style="list-style-type: none"> - Responds to due date updates - Updates requests <p>For work done on their behalf by external consultants:</p> <ul style="list-style-type: none"> - Reviews requests - Submits request - Adds documents and files
External Requestor	<p>Creates requests on behalf of an Internal Requestor</p> <p>Manages work requested:</p> <ul style="list-style-type: none"> - Responds to due date updates - Updates requests <p>Sends documents and files to Internal Requestor</p>
Section Head	Receives memo notification of all requests
Supervisors	<p>Manages requests for their groups:</p> <ul style="list-style-type: none"> - Reviews requests - Assigns requests - Updates requests - Returns requests / proposes alternate due dates - Create requests for external requestors <p>Transfers single requests (future functionality)</p>
Internal Specialist	<p>Receives assigned requests</p> <p>Manages work requested:</p> <ul style="list-style-type: none"> - Updates requests - Completes work assigned - Responds to due date updates <p>For work done on their behalf by external consultants:</p> <ul style="list-style-type: none"> - Reviews requests - Submits request - Adds documents and files
External Specialist	<p>Receives assigned requests</p> <p>Manages work requested:</p> <ul style="list-style-type: none"> - Updates requests - Completes work assigned - Responds to due date updates <p>Sends documents and files to Internal Specialist</p>
Administrator	<p>Transfers groups of requests (future functionality)</p> <p>Manages user roles, modifies information for work request types, and other administrative tasks as needed</p>
All	Generate appropriate status reports for requests (future functionality)

2.2 Logon to ETRACS

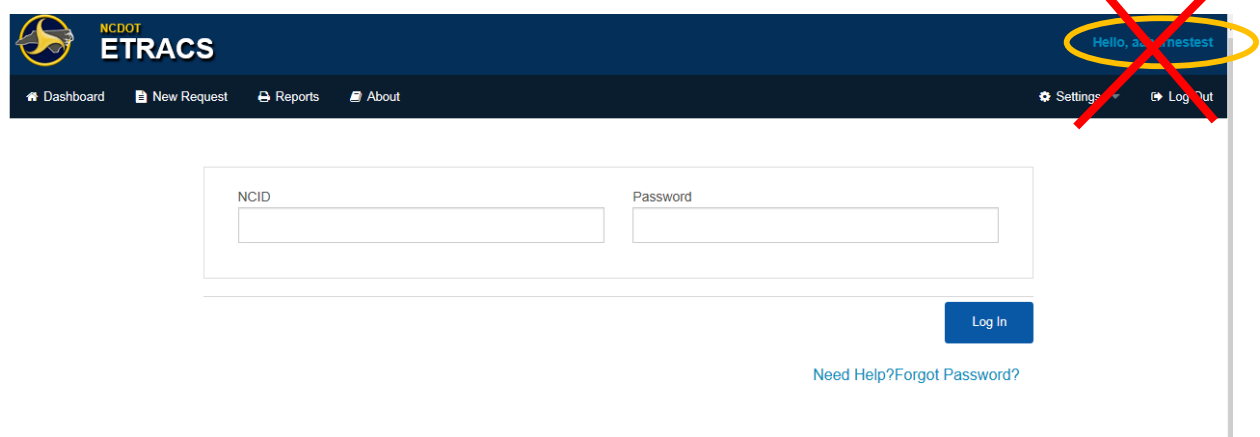
To logon to ETRACS:

1. Open a browser and navigate to PDEA ETRACS: <https://apps.ncdot.gov/PDEA/ETRACS/HES/>

The 'NC DOT ETRACS' logon page opens.



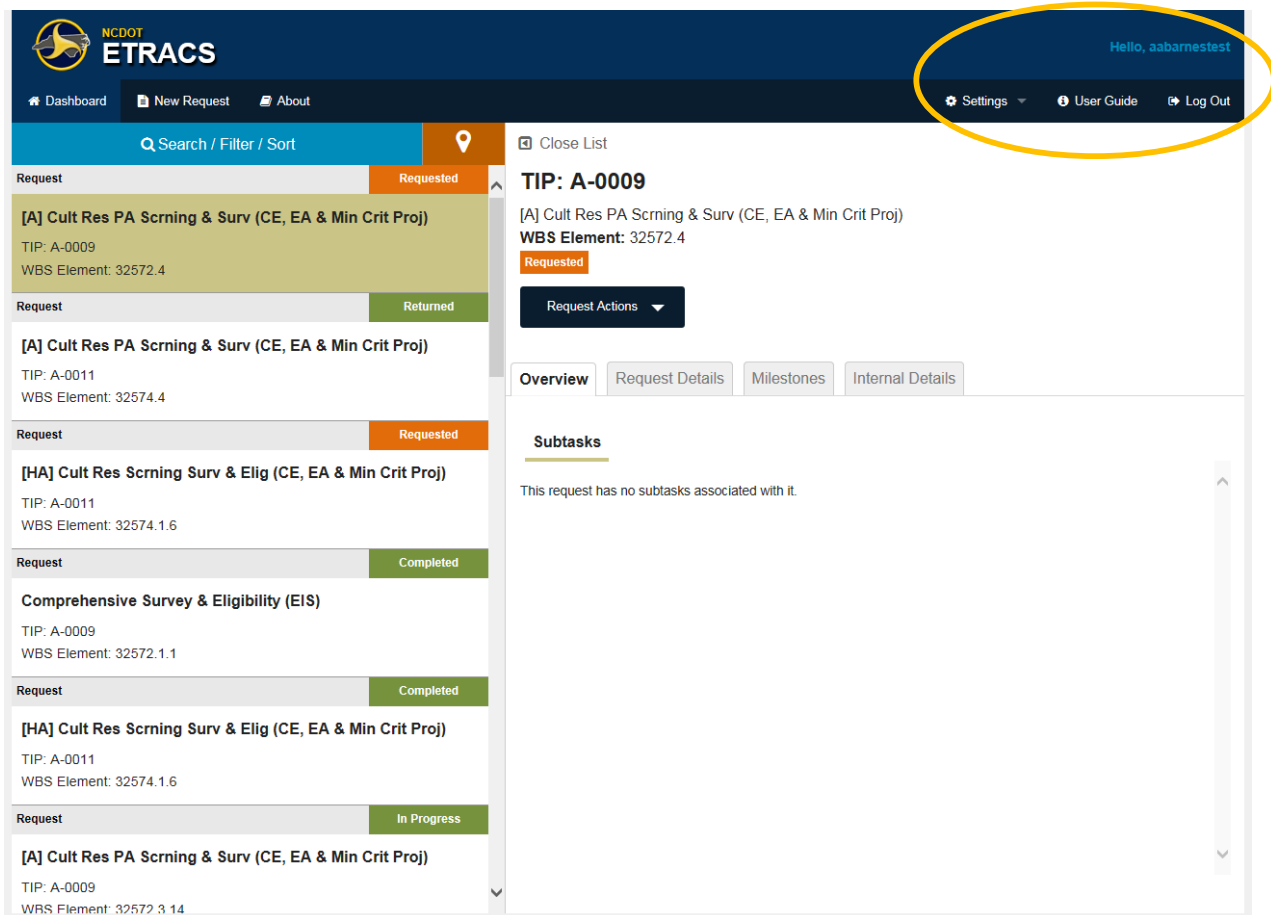
NOTE: If you ever see a logon screen with your name already shown as logged in, please log out & then log back in again. This is an indication of a system error.



2. If you would like, you may save ETRACS as a favorite in your browser for convenience.
3. Log on with your valid NCID credentials: provide your NCID and Password and click the Log In button.

When you have logged in successfully, ETRACS will acknowledge you by username & you will see your Dashboard. This view will show you all the work you've been assigned, as well as work that you have

requested, or work that you supervise. You will also have links to application **Settings** (covered below in Section 2.7, User Preferences), a link to the online **User Guide**, and a **Log Out** button.



2.3 View Dashboard: Search / Filter / Sort

The Dashboard is your primary landing spot in ETRACS. Familiarizing yourself with the dashboard will help you get up-to-speed quickly.

Depending upon your job function and the level of your activity, you could easily have 50-60 things in your dashboard. Therefore, you need a way to search and filter the list.

1. Click the Search / Filter / Sort button.

The screenshot displays the ETRACS web application interface. The top navigation bar includes the NCDOT logo, the title "ETRACS", and a user greeting "Hello, aabarnestest". Below the navigation bar, there are links for "Dashboard", "New Request", "Reports", and "About". A "Search / Filter / Sort" button is highlighted with a yellow circle. To the right of this button is a "Close List" button. The main content area is divided into two columns. The left column lists several requests, each with a title, TIP number, WBS Element, and a status (On Hold, Completed, or Returned). The right column shows details for a specific request, "TIP: A-0009", including its title, WBS Element, and a status of "On Hold". Below the details, there are tabs for "Overview", "Request Details", "Milestones", and "Internal Details". The "Overview" tab is selected, and it shows a "Subtasks" section with the message "This request has no subtasks associated with it."

The menu appears.

1. Pick your desired view. By default, the list contains only Requests and does not show either Projects or Subtasks. There are also pre-filled Statuses, which may not be useful to you. Start by using the blue CLEAR ALL option to clear possibly-extraneous information, select the checkboxes for My Work, Projects and Requests.

ETRACS Hello, aabarnestest

Dashboard New Request About Settings User Guide Log Out

Search... Keyword

Show Only:
☐ My Work ☐ Projects ☒ Requests ☐ Subtasks

Status: [Clear All](#)

☐ Show items where compliance is not complete

Section:

Project Type:

Region:

County:

Group:

Order by:

Division:

Name:

TIP: A-0009
WBS Element: 32572.5

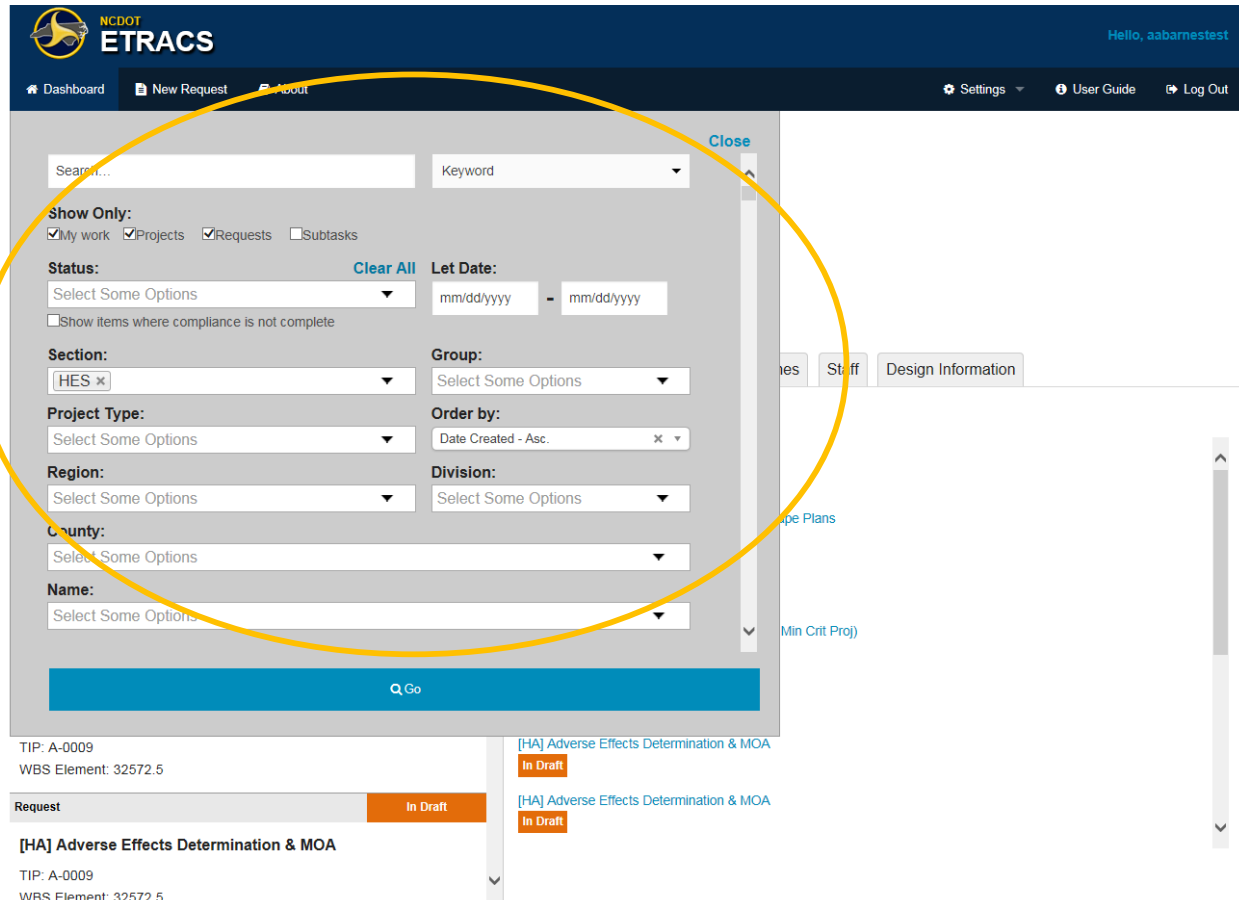
Request

[HA] Adverse Effects Determination & MOA
TIP: A-0009
WBS Element: 32572.5

[HA] Adverse Effects Determination & MOA

[HA] Adverse Effects Determination & MOA

2. Select any other parameters you need in order to conform the dashboard to the view you want. For example, you can focus on dates, status, keyword, etc. Try out the filters until you get the view you prefer. ETRACS will remember your view and bring it back the next time you log on. Of course, you can re-filter anytime you like.



The screenshot displays the ETRACS (Environmental Tracking and Reporting and Assessment System) dashboard. At the top, the NCDOT logo and 'ETRACS' header are visible, along with a user greeting 'Hello, aabarnestest'. The main navigation bar includes links for Dashboard, New Request, and About, as well as Settings, User Guide, and Log Out. A large filter overlay is prominently displayed in the center, featuring a search bar, a keyword dropdown, and various filter sections. A yellow circle highlights this filter overlay. The filter sections include 'Show Only' with checkboxes for My work, Projects, Requests, and Subtasks; 'Status' with a dropdown and a 'Clear All' link; 'Let Date' with two date pickers; 'Section' with a dropdown; 'Project Type' with a dropdown; 'Region' with a dropdown; 'County' with a dropdown; 'Name' with a dropdown; 'Group' with a dropdown; 'Order by' with a dropdown; and 'Division' with a dropdown. A 'Go' button is at the bottom of the filter overlay. Below the filter overlay, the dashboard content shows a list of requests. The first request is titled '[HA] Adverse Effects Determination & MOA' with a status of 'In Draft'. The second request is also titled '[HA] Adverse Effects Determination & MOA' with a status of 'In Draft'. The dashboard also displays a 'Request' section with a status of 'In Draft'.

3. Click the Go button to re-load the dashboard with the view you have created.

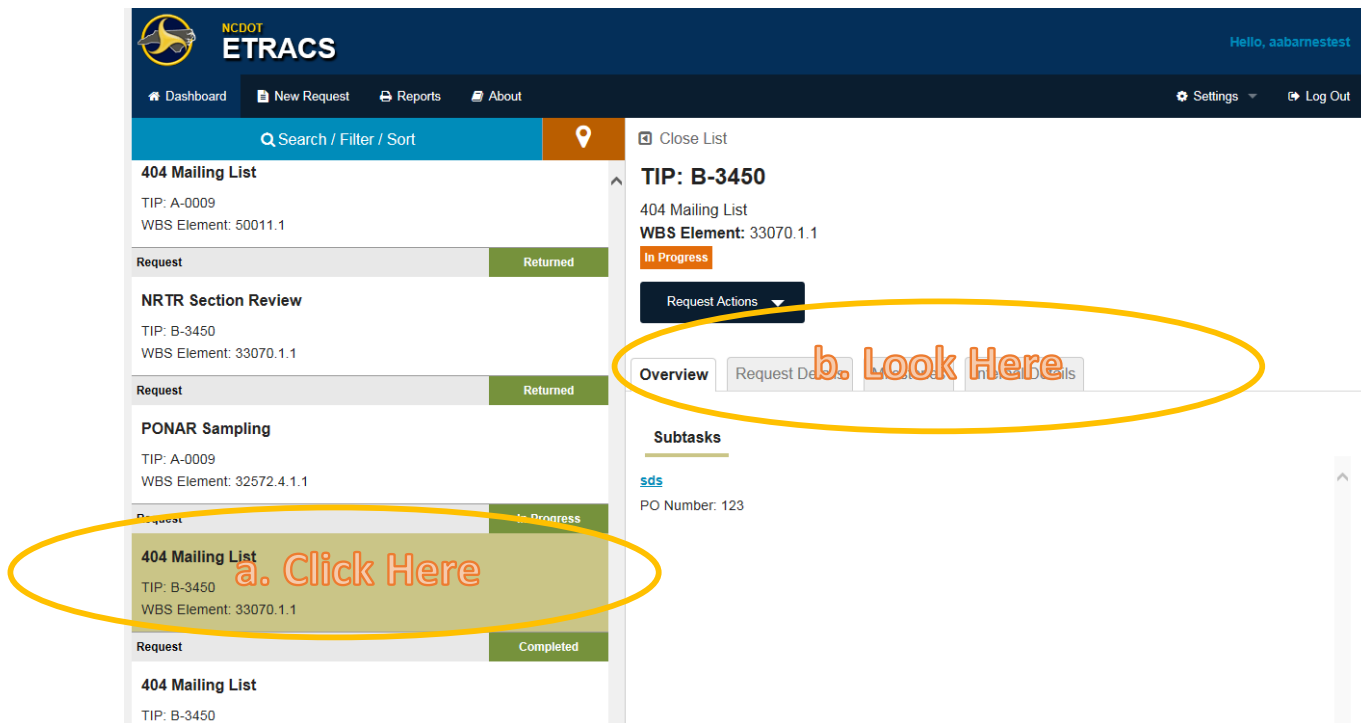
The screenshot shows the NCDOT ETRACS dashboard. A search filter overlay is displayed on the left side of the dashboard. The overlay contains the following fields and options:

- Search...** (text input)
- Keyword** (dropdown menu)
- Show Only:**
 - ☒ My work
 - ☐ Projects
 - ☒ Requests
 - ☐ Sub-Tasks
- Status:** (dropdown menu, currently showing "Select Some Options")
- Let Date:** (date range selector, currently showing "mm/dd/yyyy - mm/dd/yyyy")
- ☐ Show items where compliance is not complete
- Section:** (dropdown menu, currently showing "Select Some Options")
- Project Type:** (dropdown menu, currently showing "Select Some Options")
- Region:** (dropdown menu, currently showing "Select Some Options")
- County:** (dropdown menu, currently showing "Select Some Options")
- Name:** (dropdown menu, currently showing "Select Some Options")
- Group:** (dropdown menu, currently showing "Select Some Options")
- Order by:** (dropdown menu, currently showing "Date Created - Desc.")
- Division:** (dropdown menu, currently showing "Select Some Options")

A blue button labeled "Go" with a magnifying glass icon is located at the bottom of the filter overlay and is circled in yellow.

Below the filter overlay, the dashboard content is visible. It includes a section for "Request" with a status of "In Progress". Below this, there is a section titled "404 Mailing List" with details for TIP: B-3450 and WBS Element: 33070 1 1.

4. When you've filtered the list down to find the items you need, click on an item on the left-hand side to load it in the detail view on the right-hand side of your screen.



2.4 Basic Navigation Tips

This section of this document will provide some basic navigation tips intended to quickly acquaint you with the ETRACS “rules of the road.”

2.4.1 Screen Layout, Tabs & Action Menus

As shown in Section 2.3 “View Dashboard,” ETRACS generally flows from left-to-right.

There are a lot of different pieces of information to view and/or update for projects and requests, so you will notice a pattern of **tabs** in the edit windows. You can navigate through each tab to update the information in that tab. We suggest that you get into the habit of navigating through the tabs left-to-right to ensure that you are seeing and/or updating all of the information.

2.4.1.1 Project Tabs

With a project highlighted on the left-hand side, you will see tabs containing basic project information on the right-hand side.

NOTE: to see the project tabs, you must have “projects” in your dashboard view. See Section 2.3 “View Dashboard: Search / Filter / Sort.”

The screenshot displays the ETRACS web application interface. The top navigation bar includes the NCDOT ETRACS logo, a search bar, and links for Dashboard, New Request, About, Settings, User Guide, and Log Out. The main content area is divided into two columns. The left column lists projects, with the first project, "US 74 FROM US 19B IN ANDREWS TO US 129", highlighted in yellow. The right column shows the details for the selected project, including the TIP (A-0009), WBS Element (32572.4), and a description. Below the details, there are tabs for Overview, General Info, Milestones, Staff, and Design Information, with the Overview tab selected. A yellow oval highlights the Overview tab and the Project Actions dropdown menu.

NOTE: Additional project information will be coming into ETRACS when ECAP is implemented. This information, which will be received by the various NES groups who are working requests, is still being defined by both the NES groups and by ECAP.

UNDER CONSTRUCTION

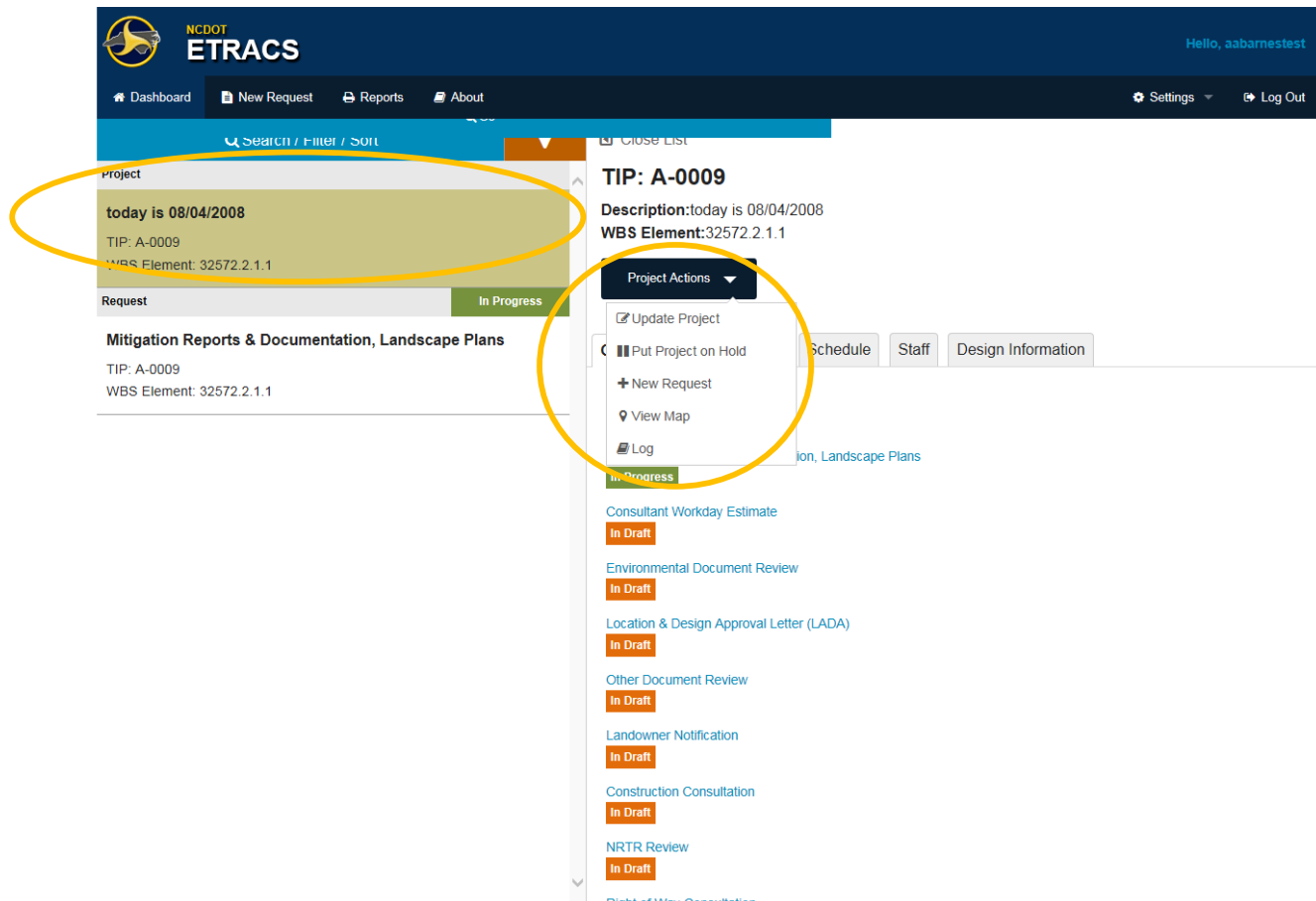
2.4.1.2 Project Actions

With a project highlighted on the left-hand side, click on the Project Actions dropdown menu to access the various basic actions that you can take at the project level. The actions available to you are

dependent upon your role. These functions will be explained below. For now, just acquaint yourself with highlighting the project and familiarizing yourself with the Project Actions menu.

NOTE: Additional project information will be coming into ETRACS when ECAP is implemented. This information, which will be received by the various NES groups who are working requests, is still being defined by both the NES groups and by ECAP.

UNDER CONSTRUCTION



2.4.1.3 Request Tabs

With a request highlighted on the left-hand side, you will see tabs containing request information on the right-hand side.

The screenshot displays the ETRACS web application interface. The top navigation bar includes the NCDOT logo, the text "ETRACS", and user information "Hello, aabarnestest". Below this, there are links for "Dashboard", "New Request", and "About". A search bar with "Search / Filter / Sort" and a location pin icon is present. The main content area is divided into two sections. On the left, a list of requests is shown, with the first request highlighted in green. This request is titled "[A] Adverse Effects Determination & MOA" and has a status of "Assigned". Below it, another request is highlighted in orange, titled "[HA] Adverse Effects Determination & MOA" with a status of "Requested". On the right, the detailed view of the selected request is shown. It includes the title "TIP: A-0009", the description "[A] Adverse Effects Determination & MOA", and the WBS Element "32572.5". A "Request Actions" dropdown menu is visible, and the "Overview" tab is selected. Below the tabs, there is a section for "Subtasks" which states "This request has no subtasks associated with it."

2.4.1.4 Request Actions

With a request highlighted on the left-hand side, click on the Request Actions dropdown menu to access the various actions that you can take for a request. The actions available to you are dependent upon

your role. These functions will be explained below; for now, just acquaint yourself with highlighting the request and familiarizing yourself with the Request Actions menu.

The screenshot displays the ETRACS web application interface. The top navigation bar includes the NCDOT logo, the ETRACS title, and a user greeting "Hello, aabarnestest". Below this, a secondary navigation bar contains links for "Dashboard", "New Request", "Reports", and "About". A search bar with the placeholder "Search / Filter / Sort" and a "Close List" button are also present.

The main content area shows a list of requests. The first request is "404 Mailing List" with TIP: A-0009 and WBS Element: 32572.1.2, status "On Hold". The second request is "404 Mailing List" with TIP: B-3450 and WBS Element: 33070.1.1, status "Completed". The third request is "404 Mailing List" with TIP: A-0009 and WBS Element: 32572.1.1, status "Returned". The fourth request is "404 Mailing List" with TIP: A-0009 and WBS Element: 32572.1.1, status "Returned". The fifth request is "Environmental Document Review" with TIP: A-0009 and WBS Element: 32572.3. The sixth request is "404 Mailing List" with TIP: A-0009 and WBS Element: 32572.1.2, status "On Hold". The seventh request is "404 Mailing List" with TIP: B-3450 and WBS Element: 33070.1.1, status "In Progress".

A yellow circle highlights the "Request Actions" menu for the "On Hold" request. The menu options are: "Return", "Update", "Log", "Transfer", "Assign", "View Map", "View Project Info", and "Delete Request".

Another yellow circle highlights the "On Hold" status of the "404 Mailing List" request with TIP: A-0009 and WBS Element: 32572.1.2.

2.4.2 Buttons

There will be Save and Cancel buttons on almost screens.

- SAVE (SAVE ALL) will save your information and will not generate notifications
- CANCEL (also X, depending upon context) will allow you to remove entered information in a text box, back out of a function, or close a window or popup, depending on context.

The screenshot displays the 'Update Request' window with the 'Internal Details' tab selected. The form contains several sections: 'Internal Due Date' with a text input field; 'HPO Details' with fields for 'Draft Report Received Date', 'Revised Draft Received Date', 'HPO Concurrence Received Date', and 'Report Transmitted to HPO Date', along with a 'View all comments' link; 'Agency Details' with fields for 'Name of Agency', 'Received From Date', and 'Delivered To Date', also with a 'View all comments' link; and 'Internal Notes' with a 'View all Internal Notes' link. At the bottom of the form, the 'Save' and 'Cancel' buttons are circled in yellow. The 'Save' button is green with a floppy disk icon, and the 'Cancel' button is white with a red 'X' icon. The background shows a sidebar with a list of requests and a top navigation bar.

Many screens also have a Submit button, depending upon the function you are performing. SUBMIT (SUBMIT ALL) will tell ETRACS to validate all of the required information and will either:

- a) Give you an error message and take you to the place where you need to correct your data
- b) Give you a success message/icon and take you to the next step in the process.

The screenshot displays the ETRACS web application interface. The top navigation bar includes the NCDOT ETRACS logo, a user greeting 'Hello, aabarnestest', and links for Dashboard, New Request, Reports, About, Settings, and Log Out. The main content area is titled 'Create Request' and contains two sections: 'HES Section' and 'NES Section'. The 'HES Section' has a dropdown menu for 'Select one or more groups from HES and one group from NES.' with options like 'Historic Architecture', 'Archaeology', and 'Environmental Coordination & Permitting'. Below this is a 'Select your request types from the groups below.' section with a list of request types including 'Adverse Effects Determination & MOA', 'Cultural Resources PA (CE & Minimum Criteria Projects)', 'Comprehensive Survey & Site Evaluation', and 'Data Recovery'. The 'NES Section' has a dropdown menu for 'Select your request types from the groups below.' with options like 'NRTR' and 'NRTR Review'. To the right of the 'Create Request' section is a 'Requests' section. It features a list of requests, with the first one titled 'Historic Architecture - Adverse Effects Determination & MOA'. This request has a 'Submit this Request' button circled in yellow. Below the request list are tabs for 'Request Details', 'Milestones', and 'Documents'. The 'Request Details' tab is active, showing a 'Vicinity Map' section and a 'Comments on Finding' section. The 'Comments on Finding' section contains a text area for 'Finding of Adverse Effects' and a text area for 'Comments on Finding'.

Many screens also have an Add and/or Remove function, depending upon what you are performing. The buttons allow you to add (+) or remove (-) an item on a screen/list.

The screenshot displays the 'Update Request' application window. It features a sidebar on the left with a navigation menu and a main content area. The main area has three tabs: 'Request Details', 'Milestones', and 'Internal Details'. The 'Request Details' tab is active. It contains two main sections: 'Comments on Mitigation Documents' and 'Common Documents'. Each section has a text input field for a path (e.g., 'C:/Some/Path'), a 'Document Name' input field, and an 'Add document path' input field. In the 'Comments on Mitigation Documents' section, a blue minus button (-) is highlighted with a yellow circle. In the 'Common Documents' section, a blue plus button (+) is highlighted with a yellow circle. Below the 'Common Documents' section, there is a 'Documents' section with a plus button (+) and a minus button (-). The sidebar on the left has a 'Request Details' section with a plus button (+) and a minus button (-).

2.5 Scroll Bars

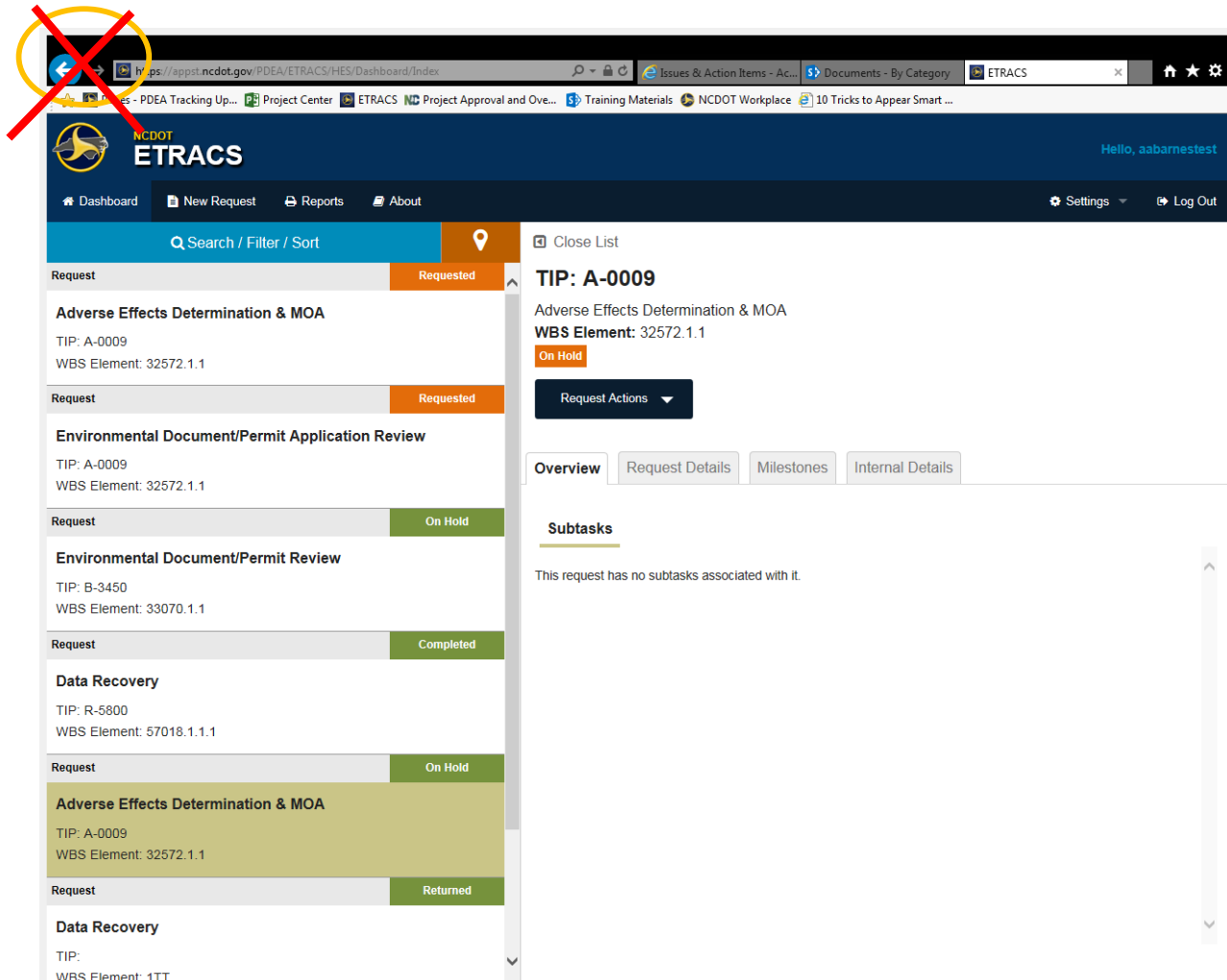
Many screens are quite large, requiring you to use the scroll bar to ensure that you see / enter all the information.

The screenshot shows the NCDOT ETRACS 'Create Request' interface. The top navigation bar includes links for Dashboard, New Request, Reports, and About, along with user settings and a Log Out button. The main content area is titled 'Create Request' and contains several sections:

- Select one or more groups from HES and one group from NES.** This section includes tags for 'Historic Architecture', 'Archaeology', and 'Environmental Coordination & Permitting'.
- Select your request types from the groups below.** This section is divided into 'HES Section' and 'NES Section'. The 'HES Section' includes tags for 'Adverse Effects Determination & MOA', 'Cultural Resources PA (CE & Minimum Criteria Projects)', 'Comprehensive Survey & Site Evaluation', and 'Data Recovery'. The 'NES Section' includes tags for 'NRTR' and 'NRTR Review'.
- Requests** section: This section displays a list of requests, with the first one being 'Historic Architecture - Adverse Effects Determination & MOA'. Below this, there are tabs for 'Request Details', 'Milestones', and 'Documents'. The 'Documents' tab is currently selected, showing a 'Vicinity Map' and several input fields for 'NCDOT Input Letters', 'Designated Lead Federal Agency', 'Preliminary Design', and 'Finding of Adverse Effects'. A yellow oval highlights the vertical scroll bar on the right side of the form, indicating that the content is scrollable.

2.6 Cautions about Browsers

As you use ETRACS to create and update requests, **please be cautious** about using the browser BACK button. In some cases, this will corrupt the request or project that you are working on. Instead, get into the habit of using the buttons, Action menus, and other functions on the screen itself to navigate.



2.7 User Preferences

You may setup your preferences for working in ETRACS.

1. Click 'Settings' from the application top navigation bar.

The screenshot displays the ETRACS application interface. The top navigation bar is dark blue and contains the NCDOT logo, the text 'ETRACS', and a user greeting 'Hello, histispecialist'. The navigation bar also includes links for 'Dashboard', 'About', 'Settings' (highlighted with a yellow circle), 'User Guide', and 'Log Out'. Below the navigation bar, there is a search bar with the text 'Search / Filter / Sort' and a 'Close List' button. The main content area is divided into two columns. The left column lists several requests, each with a status (Returned, In Progress, or Assigned) and a 'Request Actions' dropdown menu. The right column shows details for a specific request, including the title '[HA] Adverse Effects Determination & MOA', the TIP number 'A-0009', and the WBS Element '32572.5'. The 'Request Actions' dropdown menu is open, showing the 'User Preferences' option. The 'Subtasks' section below the request details indicates that there are no subtasks associated with this request.

Request	Status
[HA] Adverse Effects Determination & MOA TIP: A-0009 WBS Element: 32572.5	Returned
[HA] Adverse Effects Determination & MOA TIP: A-0009 WBS Element: 32572.3	In Progress
[HA] Adverse Effects Determination & MOA TIP: A-0009 WBS Element: 32572.3	Assigned
[HA] Adverse Effects Determination & MOA TIP: A-0009 WBS Element: 32572.3	Assigned
[HA] Adverse Effects Determination & MOA TIP: A-0009 WBS Element: 32572.5	Assigned

TIP: A-0009
[HA] Adverse Effects Determination & MOA
WBS Element: 32572.5
Returned
Request Actions

Subtasks
This request has no subtasks associated with it.

The system will show you two options for you to customize: **Notifications** and **Review Consultant Request**. Your notification defaults are shown.

2. To change Notifications, use the radio buttons to select which notifications you wish to receive/not receive.
3. If you are an Internal Requester, you can select whether or not you want to review your consultants' requests before they are submitted:
 - If you choose "Yes," the consultants' requests will come to you with "In QC" status
 - If you choose "No," the consultants' requests will be submitted through the normal process (with Submitted status) and you will receive notifications [NOTE: unless you turn off New Request notifications]

ETRACS Hello, histspecialist

Dashboard About Settings User Guide Log Out

User Preferences

Notifications to be received:

New Request <input checked="" type="radio"/> Yes <input type="radio"/> No	Updated Request <input checked="" type="radio"/> Yes <input type="radio"/> No	Accepted Request <input checked="" type="radio"/> Yes <input type="radio"/> No
Completed Request <input checked="" type="radio"/> Yes <input type="radio"/> No		

Review Consultant Request

If you want your consultants to submit requests on your behalf without your intervention, you may change your preference here:
☒ Yes ☐ No

3 Request Functions – For the Requestor

The first step in using ETRACS is to create a request. This is where the process starts!

3.1 Create Request – Step 1 Search and Retrieve Project Information

If you are an internal or external requestor, or a supervisor, you can create requests.

1. Click 'New Request' from the application top navigation bar.

The screenshot shows the ETRACS application interface. The top navigation bar includes 'Dashboard', 'New Request', 'Reports', and 'About'. A search bar is present with the text 'Search / Filter / Sort'. The main content area displays a list of requests on the left and details for a selected request on the right. The selected request is 'TIP: A-0009' with the description '404 Mailing List' and 'WBS Element: 32572.1.2'. The status is 'On Hold'. The details panel includes tabs for 'Overview', 'Request Details', 'Milestones', and 'Internal Details'. The 'Overview' tab is active, showing 'Subtasks' with the message 'This request has no subtasks associated with it.'.

The Create Request screen appears:

The screenshot shows the 'Create Request' screen in the ETRACS application. The top navigation bar is the same as the previous screenshot. The main content area is titled 'Create Request'. It features a 'Select your project type:' section with two radio buttons: 'TIP Project' (selected) and 'Non-TIP Project'. Below this is a text input field for 'Enter TIP #' and a dropdown menu for 'WBS Element(s)'. A 'Verify' button is located below the dropdown. To the right, the 'Project Description:' section contains a 'Continue' button.

Now you start by identifying the project that you're going to create requests for.

NOTE: Additional project information will be coming into ETRACS when ECAP is implemented. This information, which will be received by the various NES groups who are working requests, is still being defined by both the NES groups and by ECAP.

UNDER CONSTRUCTION

2. Select either the:
 - TIP Project radio button, or
 - Non-TIP Project radio button.

ETRACS Hello, aabarnestest

Dashboard New Request Reports About Settings Log Out

Create Request

Select your project type:

☒ TIP Project

☐ Non-TIP Project

Enter TIP #

Enter TIP #

WBS Element(s)

Verify

Project Description:

Continue

3. Enter either the:
 - TIP#, or
 - Non-TIP WBS number from SAP.

NOTE: You should always know whether your project is TIP or non-TIP. You should also always be working with a TIP#/WBS# that you know exists as an active project in SAP\STaRS in the database that ETRACS is connected to.

WARNING: Do not select Non-TIP for a project that exists under a TIP number. This will cause unpredictable results, and ETRACS will not pull in the SAP/STaRS information!

ETRACS Hello, aabarnestest

Dashboard New Request Reports About Settings Log Out

Create Request

Select your project type:

☒ TIP Project

☐ Non-TIP Project

Enter TIP #

Enter TIP #

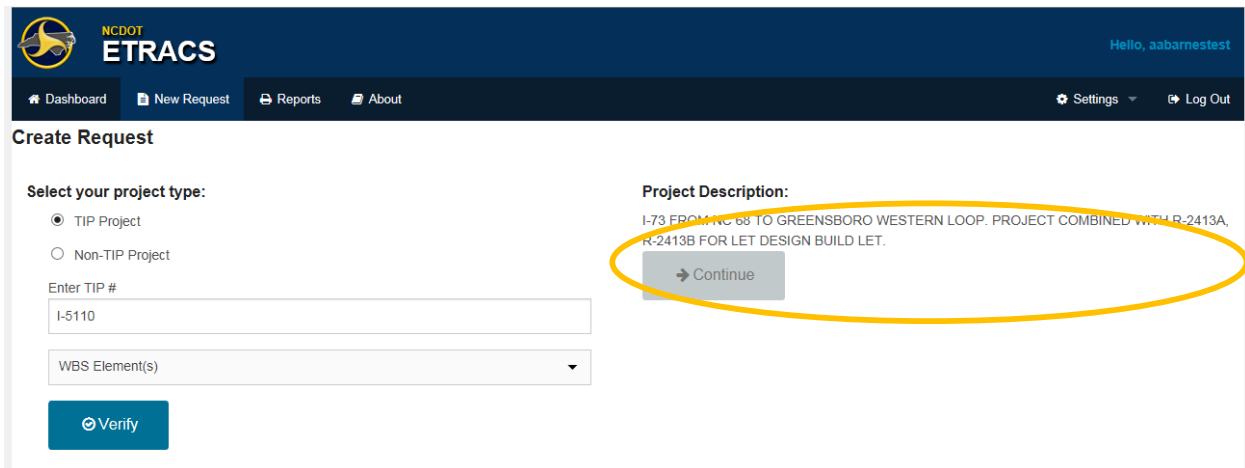
WBS Element(s)

Verify

Project Description:

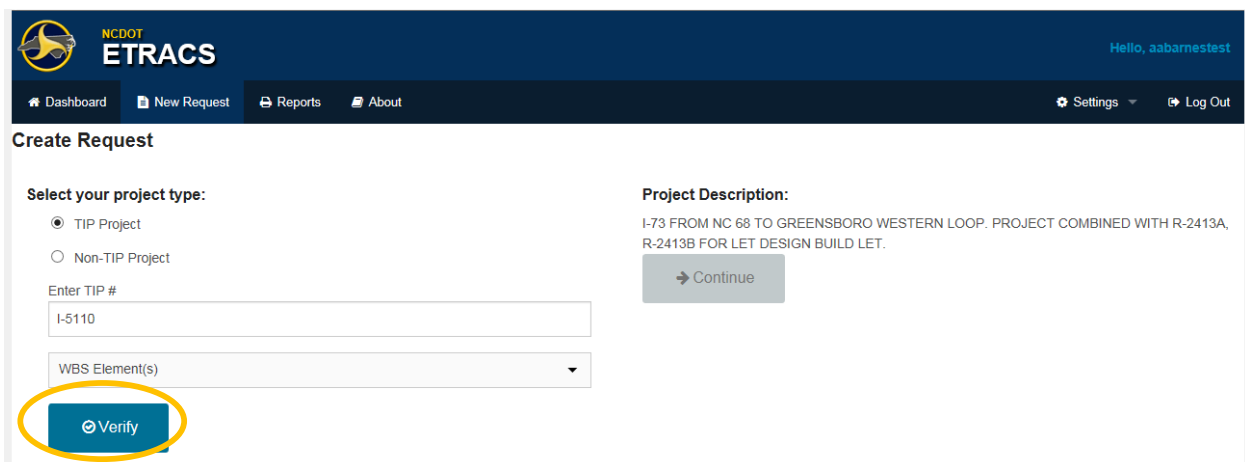
Continue

ETRACS will take a few seconds to load data from STaRS and will display the Project Description. Check to be sure you have the correct project loaded.



The screenshot shows the ETRACS web application interface. At the top, there is a navigation bar with the ETRACS logo, user name 'Hello, aabarnestest', and links for Dashboard, New Request, Reports, About, Settings, and Log Out. The main section is titled 'Create Request'. Under 'Select your project type:', there are two radio buttons: 'TIP Project' (selected) and 'Non-TIP Project'. Below this is a text input field for 'Enter TIP #' containing 'I-5110' and a dropdown menu for 'WBS Element(s)'. A blue 'Verify' button is at the bottom left. On the right, the 'Project Description:' field displays the text 'I-73 FROM NC 68 TO GREENSBORO WESTERN LOOP. PROJECT COMBINED WITH R-2413A, R-2413B FOR LET DESIGN BUILD LET.' and a grey 'Continue' button. A yellow oval highlights the 'Continue' button.

4. Click the Verify button.



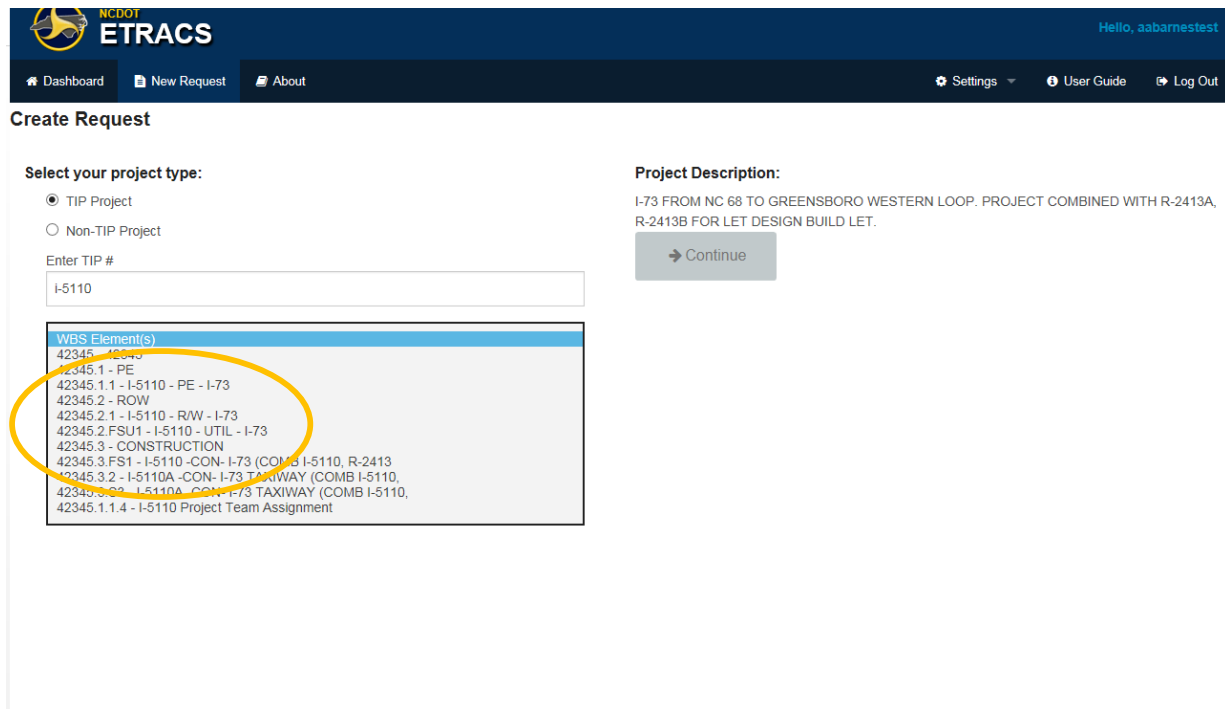
This screenshot is identical to the previous one, showing the 'Create Request' page. However, a yellow oval now highlights the blue 'Verify' button at the bottom left of the form.

5. If you have selected:

- a. TIP Project, you must now select the WBS number at the level where you want to create the request. Proceed to the next step.
- b. The WBS# for a non-TIP project, it will be already be displayed.

NOTE: project data is normally stored in SAP at the 3rd level. However, ETRACS will display all of the WBS levels that are in SAP and will allow you to create a request at any level of the WBS.

NOTE: SAP filters out all project/WBS numbers that have been completed and closed. Therefore, you will not see them in your search. Contact your supervisor if you believe that this will be a problem for your creating a request.



ETRACS Hello, aabarnestest

Dashboard New Request About Settings User Guide Log Out

Create Request

Select your project type:

☒ TIP Project
☐ Non-TIP Project

Enter TIP #
I-5110

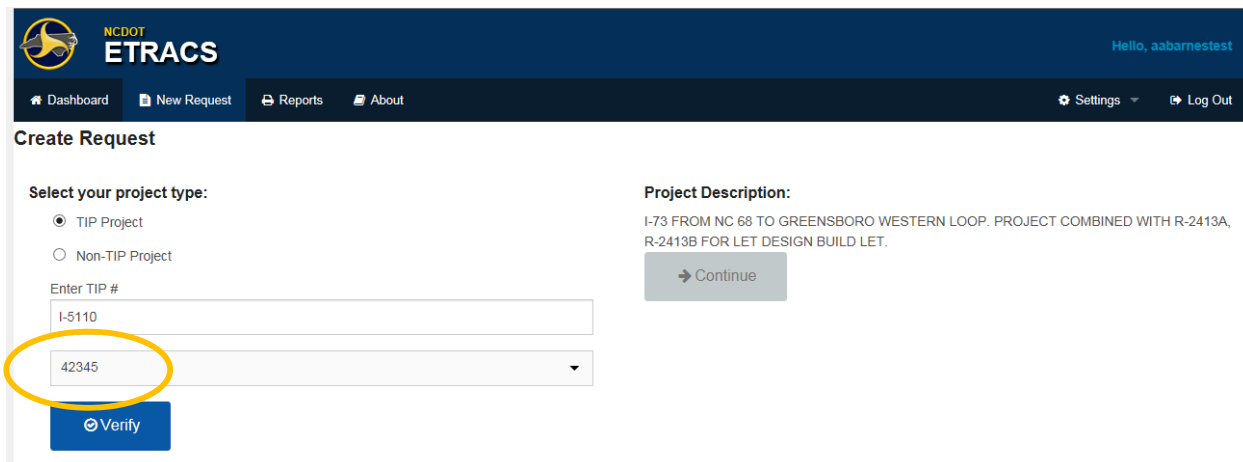
WBS Element(s)

- 42345 - I-5110
- 42345.1 - PE
- 42345.1.1 - I-5110 - PE - I-73
- 42345.2 - ROW
- 42345.2.1 - I-5110 - R/W - I-73
- 42345.2.FSU1 - I-5110 - UTIL - I-73
- 42345.3 - CONSTRUCTION
- 42345.3.FS1 - I-5110 - CON- I-73 (COMB I-5110, R-2413
- 42345.3.2 - I-5110A - CON- I-73 TAXIWAY (COMB I-5110,
- 42345.3.2.1 - I-5110A - CON- I-73 TAXIWAY (COMB I-5110,
- 42345.1.1.4 - I-5110 Project Team Assignment

Project Description:
I-73 FROM NC 68 TO GREENSBORO WESTERN LOOP. PROJECT COMBINED WITH R-2413A, R-2413B FOR LET DESIGN BUILD LET.

Continue

6. Select the WBS number at the level where you want to create the request.



ETRACS Hello, aabarnestest

Dashboard New Request Reports About Settings Log Out

Create Request

Select your project type:

☒ TIP Project
☐ Non-TIP Project

Enter TIP #
I-5110

42345

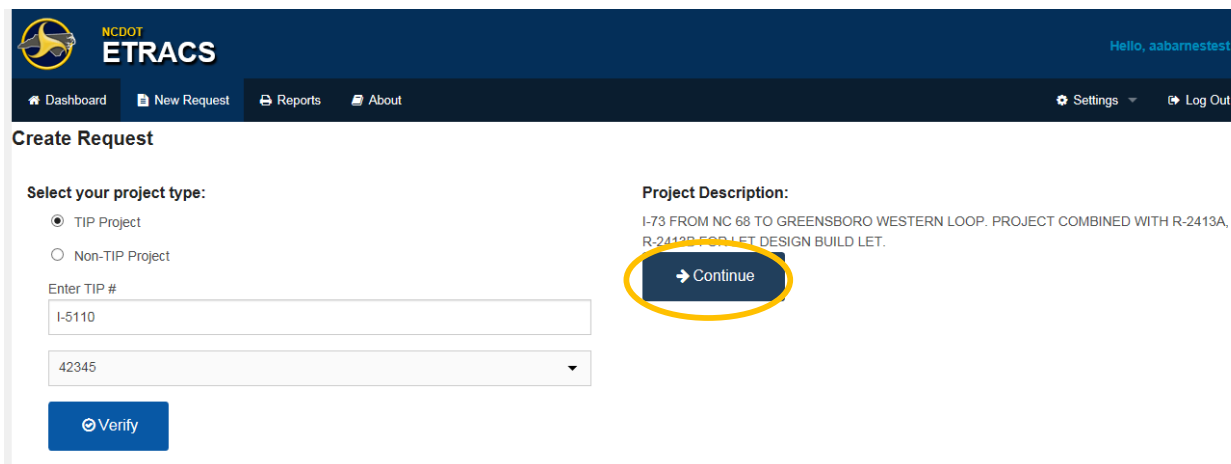
Verify

Project Description:
I-73 FROM NC 68 TO GREENSBORO WESTERN LOOP. PROJECT COMBINED WITH R-2413A, R-2413B FOR LET DESIGN BUILD LET.

Continue

The blue Continue button will now be active.

7. Click the Continue button.



The system will now display all of the Project Information from STaRS on the four tabs, as explained in the section, Project Information Tabs, below.

User Tip: ETRACS considers the **PROJECT** to be the level of information that exists in STaRS with the unique combination of TIP, Sub-TIP, and WBS.

3.1.1 Project Information Tabs

This section explains how to fill out the four project information tabs. The data pulled from STaRS/SAP will display on the tabs, and ETRACS allows you to update any information before creating your request. There is lots of information, so you will need to check all four tabs.

NOTE: all fields marked with a red asterisk (*) are required. You will be prompted for the areas where there is missing information that will prevent your creating your request.

NOTE: Additional project information will be coming into ETRACS when ECAP is implemented. This information, which will be received by the various NES groups who are working requests, is still being defined by both the NES groups and by ECAP.

UNDER CONSTRUCTION

The following five tabs/functions are described below:

3.1.1.1 GENERAL INFO TAB

3.1.1.2 MILESTONES TAB

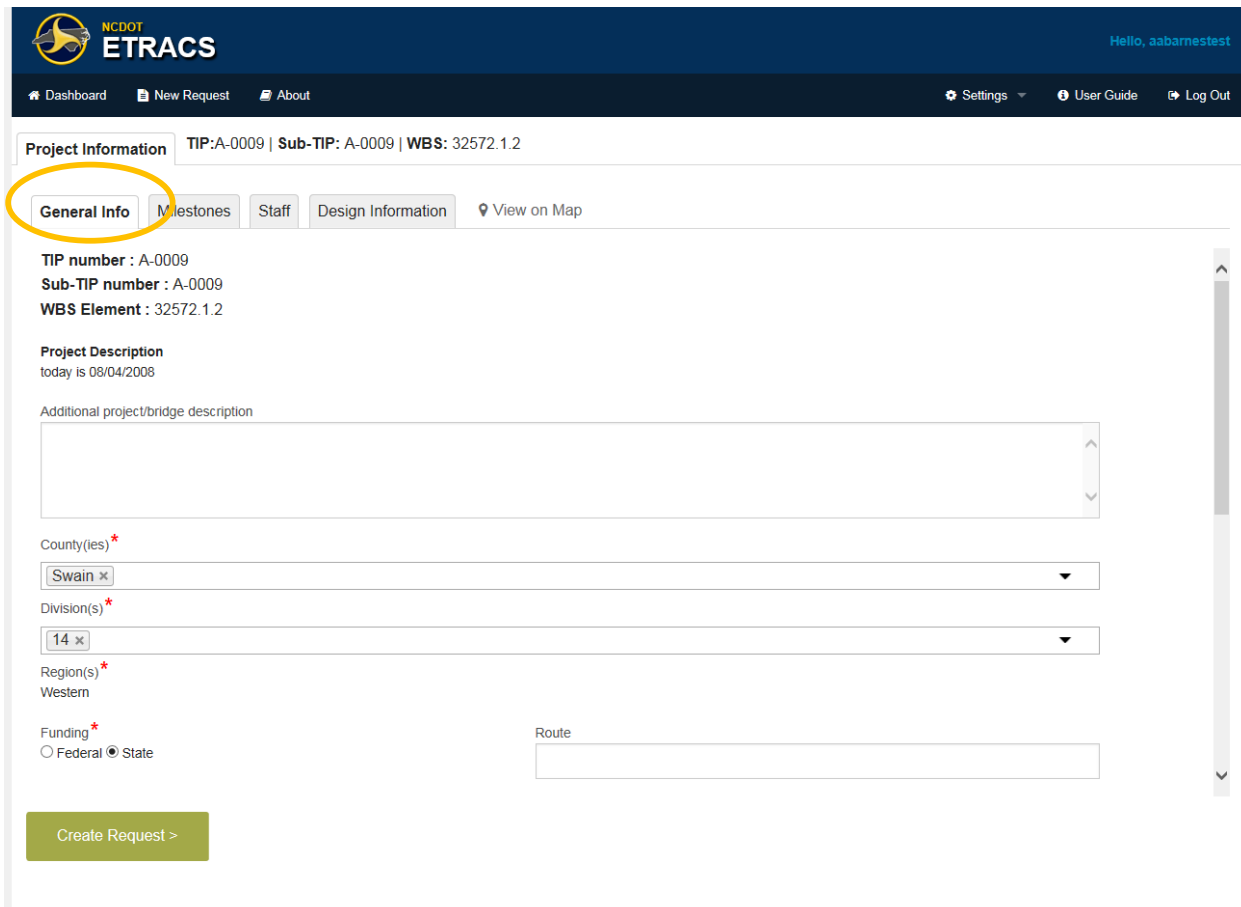
3.1.1.3 STAFF TAB

3.1.1.4 DESIGN INFORMATION TAB

3.1.2 VIEW ON MAP

3.1.1.1 General Info Tab

8. Select the General Info tab.



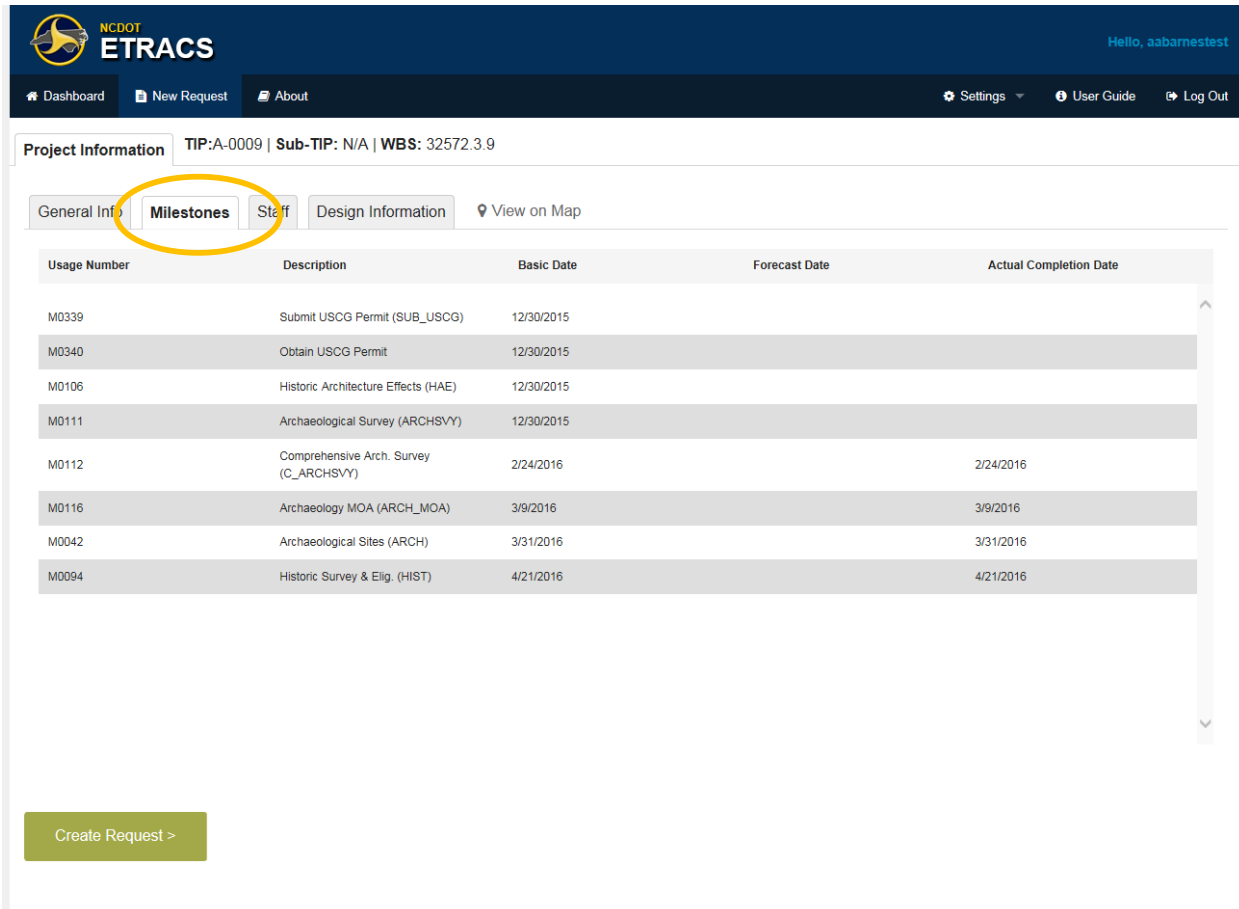
The screenshot shows the ETRACS web application interface. At the top, there is a dark blue header with the NCDOT logo and the text "Hello, aabarnestest". Below the header is a navigation bar with links for "Dashboard", "New Request", and "About". On the right side of the navigation bar are links for "Settings", "User Guide", and "Log Out". The main content area is titled "Project Information" and displays the following details: "TIP: A-0009 | Sub-TIP: A-0009 | WBS: 32572.1.2". Below this, there are four tabs: "General Info", "Milestones", "Staff", and "Design Information". The "General Info" tab is selected and highlighted with a yellow circle. The "General Info" tab contains the following information: "TIP number : A-0009", "Sub-TIP number : A-0009", "WBS Element : 32572.1.2", "Project Description" (today is 08/04/2008), and a text area for "Additional project/bridge description". Below the text area are three dropdown menus: "County(ies) *" (selected: Swain), "Division(s) *" (selected: 14), and "Region(s) *" (selected: Western). There is also a "Funding" section with radio buttons for "Federal" and "State" (selected: State). A "Route" text field is located to the right of the "Funding" section. At the bottom left, there is a green button labeled "Create Request >". A vertical scrollbar is visible on the right side of the form.

The General Info tab contains the most-current information from STaRS, as well as all updates by anyone else who has been working on this project in ETRACS. This is a long screen with lots of information, so use the scroll bar(s) to review and/or edit.

9. Provide updates as needed. Information can be added to any editable field.

3.1.1.2 Milestones Tab

10. Select the Milestones tab.



The screenshot shows the ETRACS application interface. The top navigation bar includes the NCDOT logo, the text "Hello, aabarnestest", and links for Dashboard, New Request, About, Settings, User Guide, and Log Out. The main content area is titled "Project Information" with fields for TIP:A-0009, Sub-TIP: N/A, and WBS: 32572.3.9. Below this, there are tabs for General Info, Milestones (highlighted with a yellow circle), Staff, and Design Information. A "View on Map" link is also present. The Milestones tab displays a table with the following data:

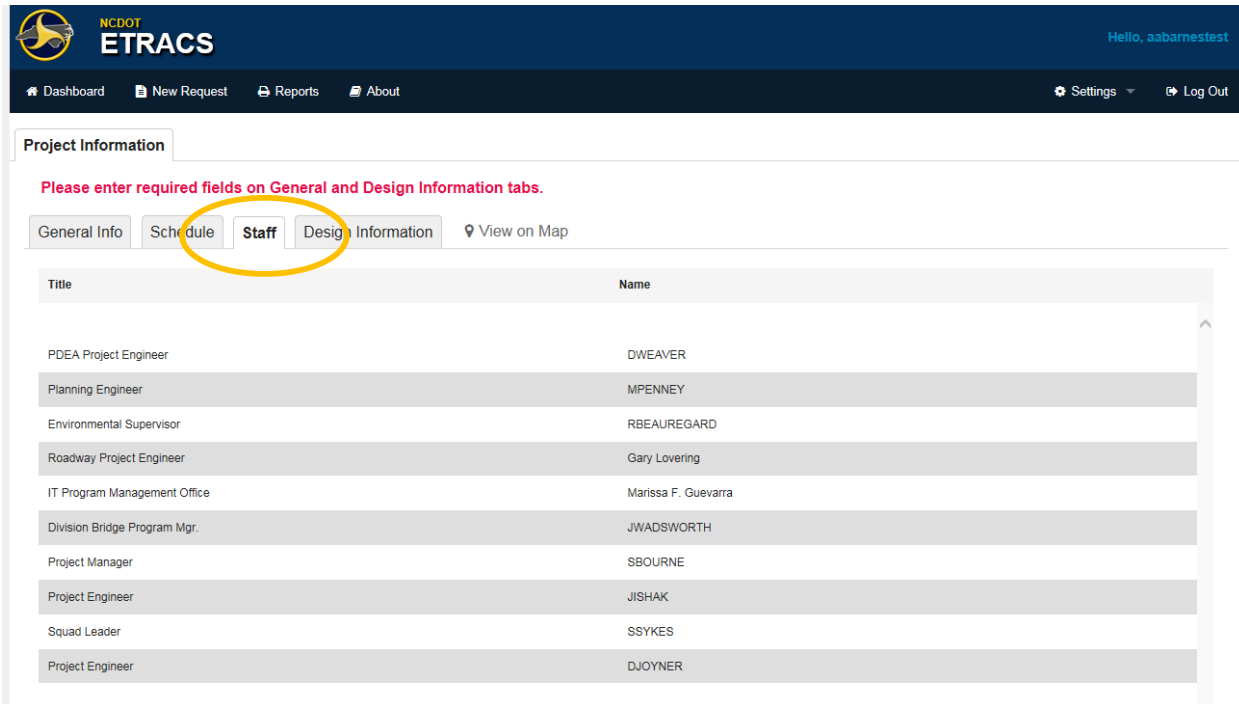
Usage Number	Description	Basic Date	Forecast Date	Actual Completion Date
M0339	Submit USCG Permit (SUB_USCG)	12/30/2015		
M0340	Obtain USCG Permit	12/30/2015		
M0106	Historic Architecture Effects (HAE)	12/30/2015		
M0111	Archaeological Survey (ARCHSVY)	12/30/2015		
M0112	Comprehensive Arch. Survey (C_ARCHSVY)	2/24/2016		2/24/2016
M0116	Archaeology MOA (ARCH_MOA)	3/9/2016		3/9/2016
M0042	Archaeological Sites (ARCH)	3/31/2016		3/31/2016
M0094	Historic Survey & Elig. (HIST)	4/21/2016		4/21/2016

At the bottom of the page, there is a green button labeled "Create Request >".

11. Check the information that has come from STaRS/SAP. You may not update. Check the milestone list to ensure you are at the proper WBS level.

3.1.1.3 Staff Tab

12. Select the Staff tab.



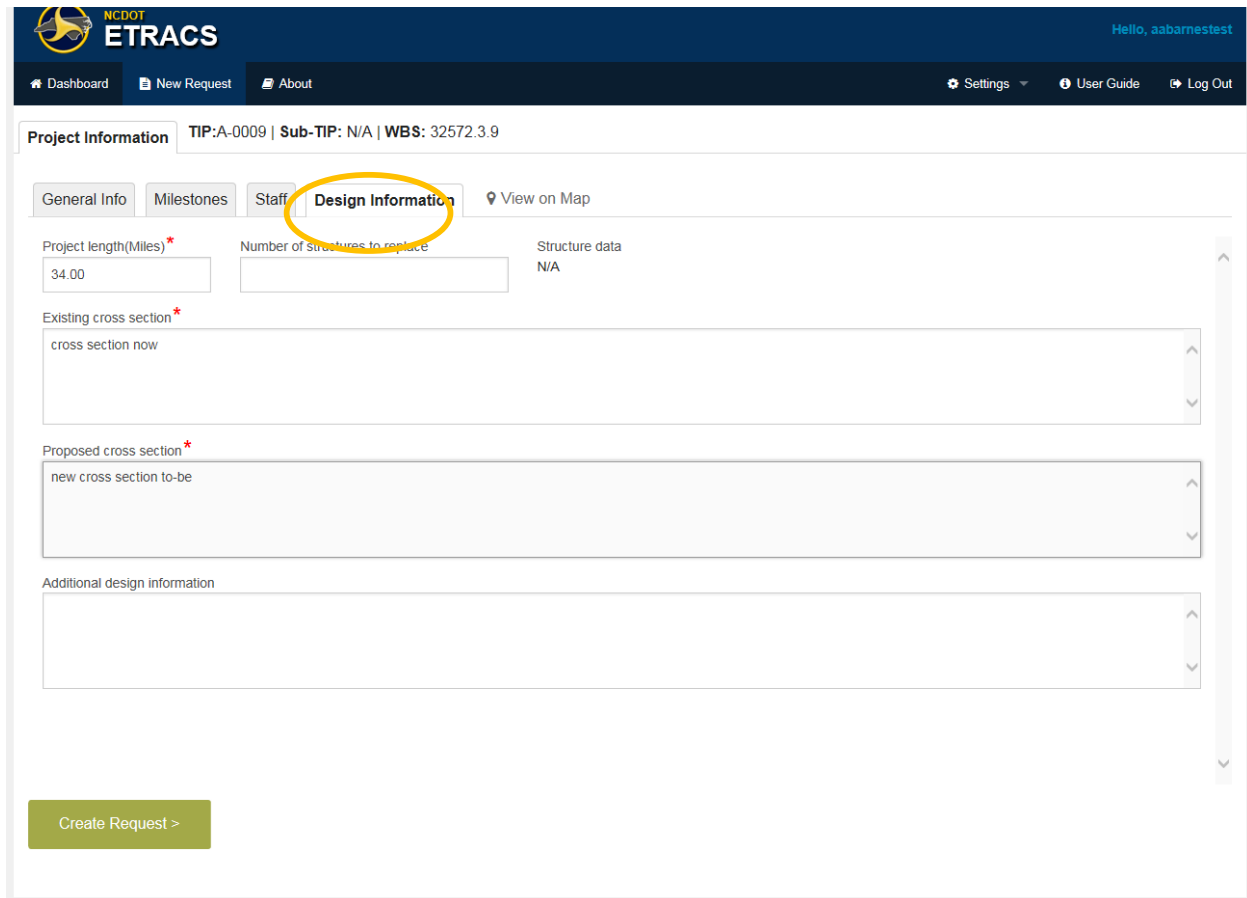
The screenshot shows the ETRACS Project Information page. The 'Staff' tab is selected and highlighted with a yellow circle. The page displays a table of staff members with their titles and names. A red message at the top states: 'Please enter required fields on General and Design Information tabs.'

Title	Name
PDEA Project Engineer	DWEAVER
Planning Engineer	MPENNEY
Environmental Supervisor	RBEAUREGARD
Roadway Project Engineer	Gary Lovering
IT Program Management Office	Marissa F. Guevarra
Division Bridge Program Mgr.	JWADSWORTH
Project Manager	SBOURNE
Project Engineer	JISHAK
Squad Leader	SSYKES
Project Engineer	DJOYNER

13. Check the information that has come from STaRS/SAP. You may not update.

3.1.1.4 Design Information Tab

14. Select the Design Information tab.



The screenshot shows the ETRACS web application interface. At the top, there is a dark blue header with the NCDOT logo and the text "Hello, aabarnestest". Below the header is a navigation bar with links for "Dashboard", "New Request", and "About". On the right side of the navigation bar are links for "Settings", "User Guide", and "Log Out".

The main content area is titled "Project Information" and displays the following details: "TIP:A-0009 | Sub-TIP: N/A | WBS: 32572.3.9". Below this, there are four tabs: "General Info", "Milestones", "Staff", and "Design Information". The "Design Information" tab is selected and highlighted with a yellow circle. To the right of the tabs is a "View on Map" link.

The "Design Information" tab contains several form fields:

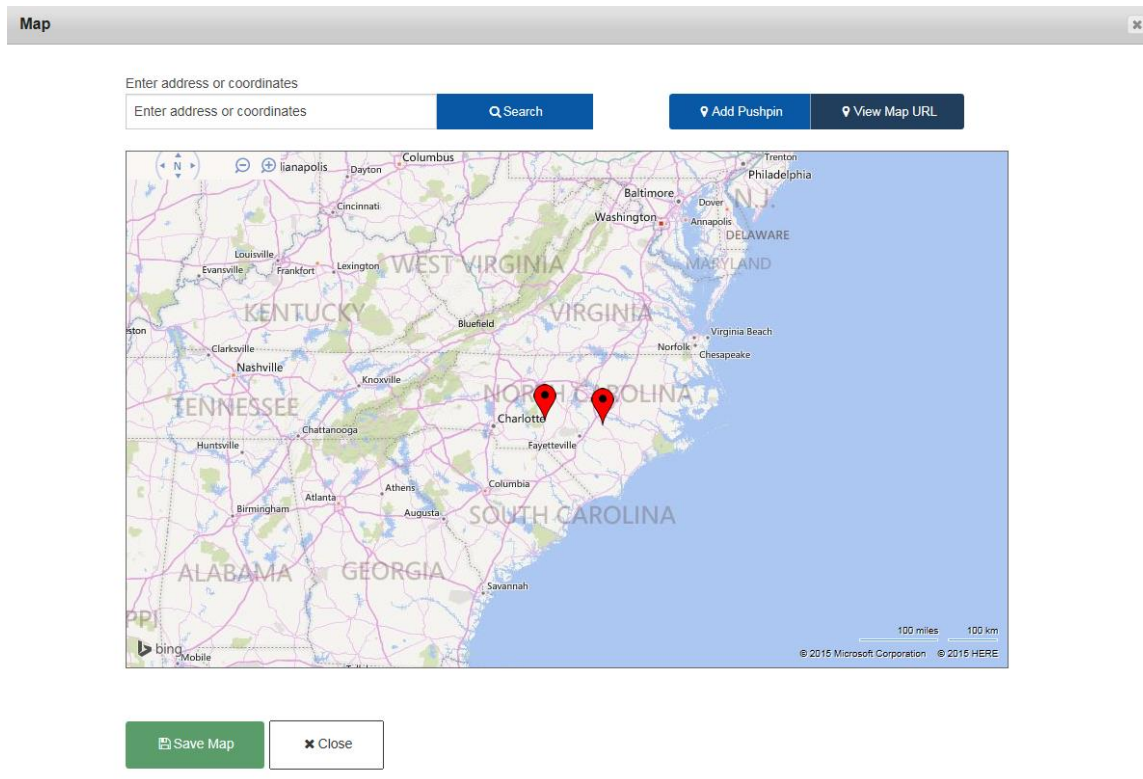
- Project length(Miles)***: A text input field containing "34.00".
- Number of structures to replace**: A text input field.
- Structure data**: A text input field containing "N/A".
- Existing cross section***: A large text area containing "cross section now".
- Proposed cross section***: A large text area containing "new cross section to-be".
- Additional design information**: A large text area.

At the bottom left of the form is a green button labeled "Create Request >".

15. Provide updates as needed. Information can be added to any editable field.

3.1.2 View on Map

16. After you are satisfied with the information on the tabs, you may click on the View on Map function.



17. Provide updates as needed.

18. Add **all the pins you want**, then click the Save Map button.

NOTE: Project pins are red. Request pins are yellow.

3.1.2.1 Basic Project Information Complete

When all required information has been entered – that is, all fields marked with a red asterisk * – and you are satisfied with all of the project information on all four tabs and the map:

19. Click the Create Request button at the bottom of the Design Information tab.

Dashboard New Request Reports About Settings Log Out

Project Information

General Info Schedule Staff Design Information View on Map

Project length(Miles)* 22.20

Number of structures to replace

Existing cross section* ghgfm

Proposed cross section* hgjhgj

Additional design information

Create Request >

NOTE: The system has now saved your project information.

An empty Create Request screen appears.

NCDOT ETRACS Hello, aabarnestest

Dashboard New Request About Settings User Guide Log Out

Create Request TIP: A-0009 | Sub-TIP: A-0009 | WBS: 32572.4

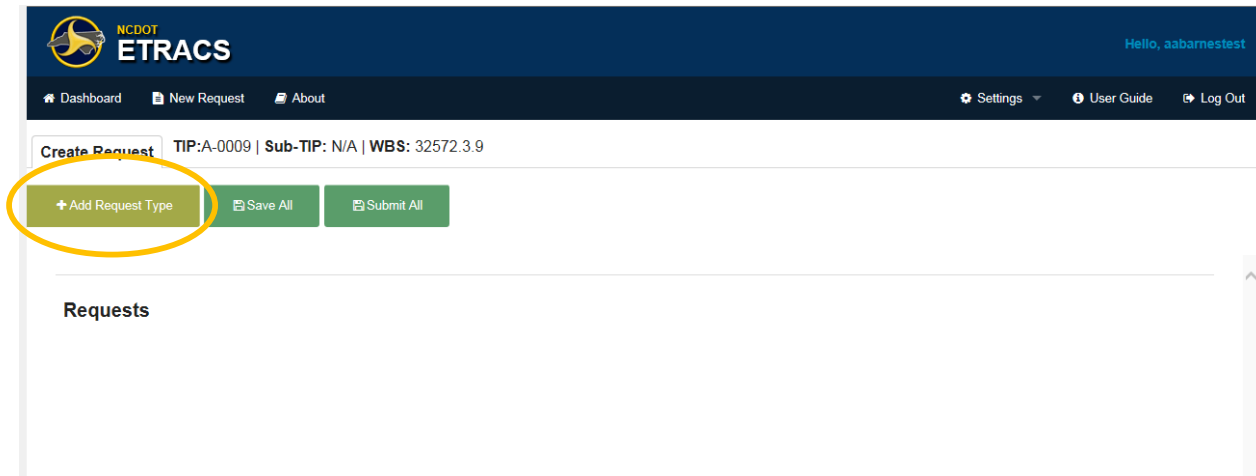
+ Add Request Type Save All Submit All

Requests

3.2 Create Request – Step 2 Create Your List of Requests

Starting on the empty Create Request screen:

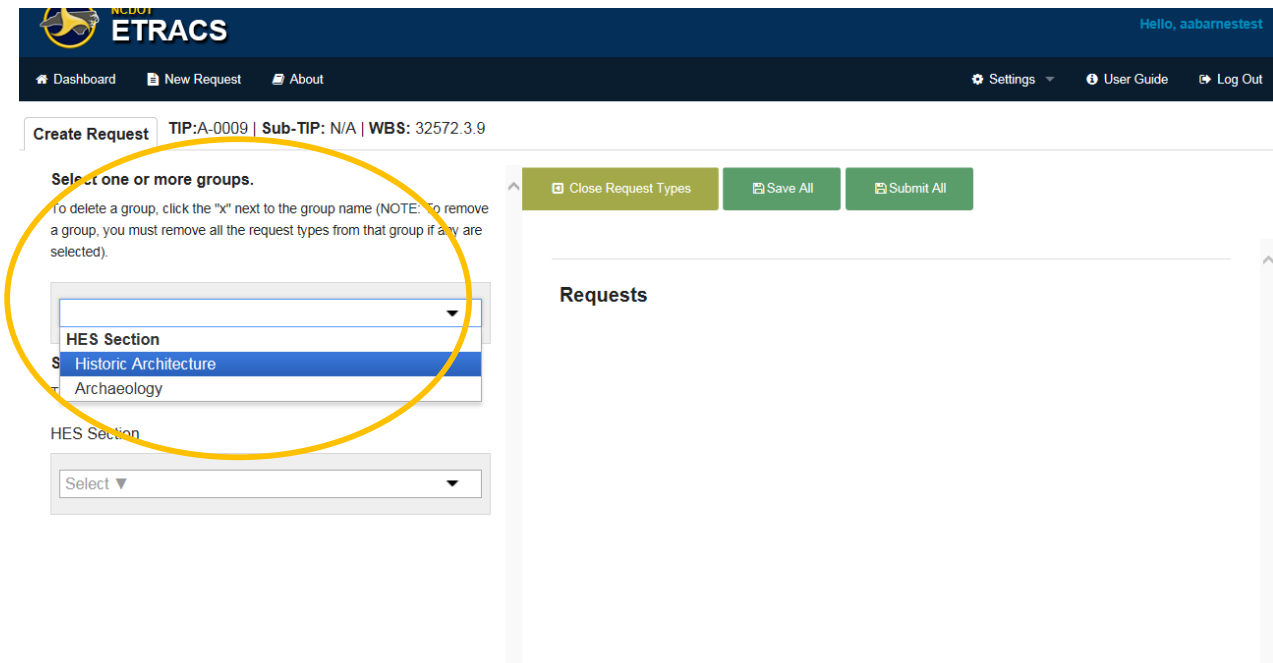
1. Click the + Add Request Type button.



The screenshot shows the ETRACS 'Create Request' interface. At the top, there's a header with the NCDOT logo and 'Hello, aabarnestest'. Below the header is a navigation bar with 'Dashboard', 'New Request', and 'About'. The main content area has a 'Create Request' tab with 'TIP:A-0009 | Sub-TIP: N/A | WBS: 32572.3.9'. Below this, there are three buttons: '+ Add Request Type' (circled in yellow), 'Save All', and 'Submit All'. The 'Requests' section is currently empty.

The Request Selection panel appears on the left-hand side.

2. In the first dropdown on the left-hand selection panel, select as many groups as you need.



The screenshot shows the ETRACS 'Create Request' interface with the Request Selection panel open. The panel has a title 'Select one or more groups.' and a note: 'To delete a group, click the "x" next to the group name (NOTE: To remove a group, you must remove all the request types from that group if any are selected)'. Below the note is a dropdown menu with 'HES Section' selected. Below the dropdown is a list of groups: 'Historic Architecture' and 'Archaeology'. The 'Requests' section is currently empty.

- On the second dropdown on the left-hand selection panel, select the appropriate request type(s) from the groups that are enabled.

ETRACS Hello, aabarnestest

Dashboard New Request About Settings User Guide Log Out

Create Request TIP:A-0009 | Sub-TIP: A-0009 | WBS: 32572.4

Select one or more groups.
To delete a group, click the "x" next to the group name (NOTE: To remove a group, you must remove all the request types from that group if any are selected).

Historic Architecture Archaeology

Select request types.
To delete a work request, click the "x" next to the work request type.

HES Section

Comprehensive Survey & Eligibility (EIS) x
[HA] Adverse Effects Determination & MOA x
Archaeological Resources Screening & Scoping (EIS) x
[A] Adverse Effects Determination & MOA x

Requests

- Historic Architecture - Comprehensive Survey & Eligibility (EIS)
- Historic Architecture - [HA] Adverse Effects Determination & MOA
- Archaeology - Archaeological Resources Screening & Scoping (EIS)
- Archaeology - [A] Adverse Effects Determination & MOA

Close Request Types Save All Submit All

The request type(s) you selected will appear in the left-hand selection panel and also in a list in the right-hand panel.

NOTE: if you change your mind about the group and/or section you have on the left-hand list, you can click the clear symbol (x) at any time before you submit the request.

NOTE: You may click "Save All" at any point so that you can leave & return later to finish your requests.

Screen Tips:

A. If you want more space on the right-hand panel, you may select the Close Request Types button.

The screenshot shows the ETRACS 'Create Request' form. The 'Close Request Types' button is highlighted with a yellow circle. The form includes sections for selecting groups from HES and NES, and request types from the groups below. The 'Requests' section on the right lists several request types, including 'Historic Architecture - Adverse Effects Determination & MOA', 'Historic Architecture - Cultural Resources PA (CE & Minimum Criteria Projects)', 'Archaeology - Comprehensive Survey & Site Evaluation', and 'Archaeology - Data Recovery'.

B. To open up the left panel back up again, simply select Add Request Type.

The screenshot shows the ETRACS 'Create Request' form. The 'Add Request Type' button is highlighted with a yellow circle. The form includes a 'Document to review' section with a URL. The 'Requests' section on the right lists several request types, including 'Historic Architecture - Adverse Effects Determination & MOA', 'Historic Architecture - Cultural Resources PA (CE & Minimum Criteria Projects)', 'Archaeology - Comprehensive Survey & Site Evaluation', and 'Archaeology - Data Recovery'. The 'Request Details' tab is selected, showing a table with columns for Usage Number, Description, Basic Date, and Actual Completion Date. The table contains one row with Usage Number M0116 and Description Cultural Resources MOA.

3.3 Create Request – Step 3 Create Request Details

4. On the right-hand panel, select the down arrow ▼ for the request you want to work on.

ETRACS Hello, aabarnestest

Dashboard New Request About Settings User Guide Log Out

Create Request TIP:A-0009 | Sub-TIP: A-0009 | WBS: 32572.4

Select one or more groups.
To delete a group, click the "x" next to the group name (NOTE: To remove a group, you must remove all the request types from that group if any are selected).

Historic Architecture Archaeology

Select your request types.
To delete a work request, click the "x" next to the work request type.

HES Section

Comprehensive Survey & Eligibility (EIS) x
[HA] Adverse Effects Determination & MOA x
Archaeological Resources Screening & Scoping (EIS) x
[A] Adverse Effects Determination & MOA x

Requests

- Historic Architecture - Comprehensive Survey & Eligibility (EIS) ▼
- Historic Architecture - [HA] Adverse Effects Determination & MOA ▼
- Archaeology - Archaeological Resources Screening & Scoping (EIS) ▼
- Archaeology - [A] Adverse Effects Determination & MOA ▼

For each request, the Request Details open with 3 tabs for you to enter information as explained in the following sections:

3.3.1 REQUEST DETAILS TAB

3.3.2 MILESTONES TAB

3.3.3 DOCUMENTS TAB

3.3.1 Request Details Tab

1. Click on the Request Details Tab. Note the requested suggestion for lead time for this request

The screenshot displays the ETRACS web application interface. At the top, the NCDOT ETRACS logo is on the left, and the user's name 'Hello, aabarnestest' is on the right. Below the header, there are navigation links: Dashboard, New Request, and About. On the right side of the header, there are links for Settings, User Guide, and Log Out.

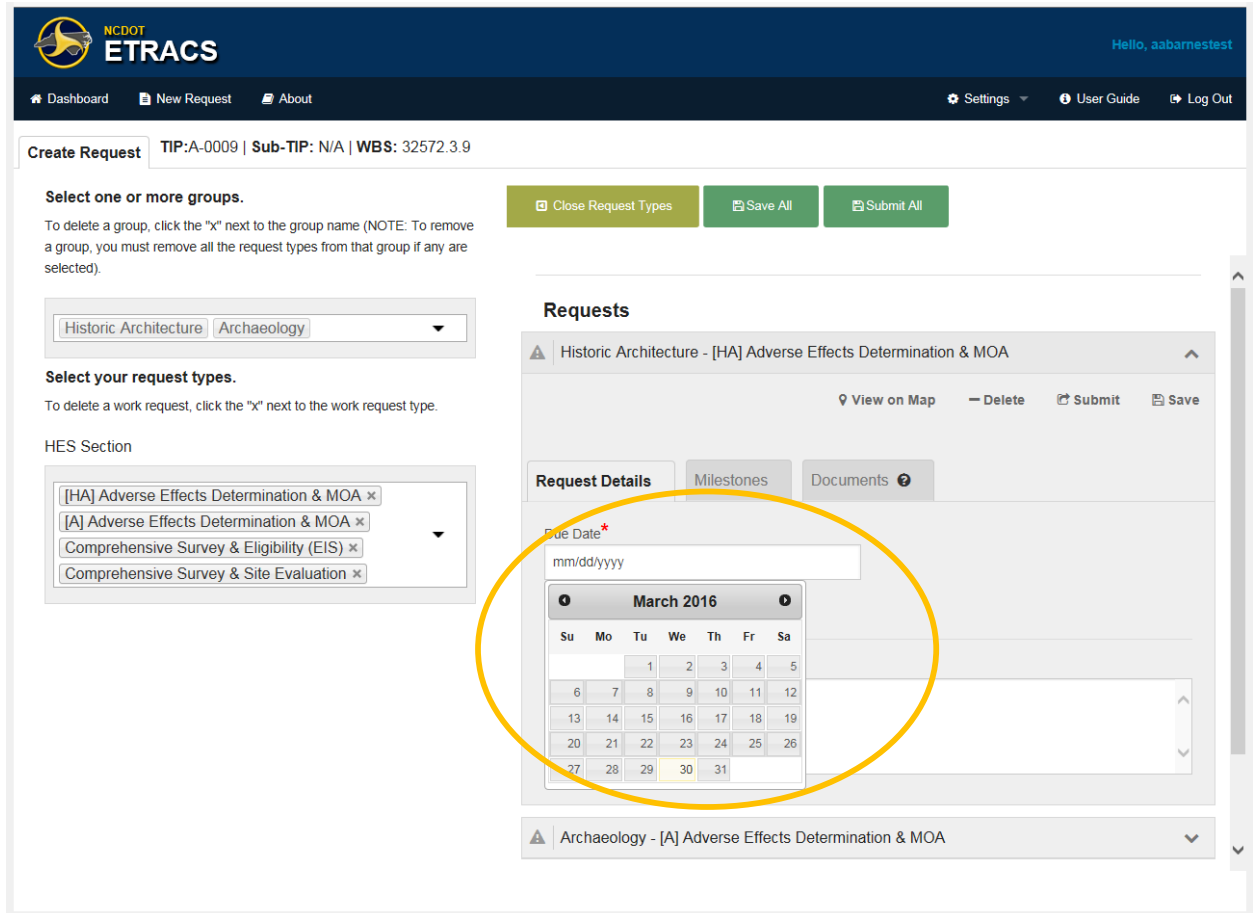
The main content area is titled 'Create Request' and shows the request ID 'TIP:A-0009 | Sub-TIP: N/A | WBS: 32572.3.9'. Below this, there are three buttons: 'Close Request Types', 'Save All', and 'Submit All'.

The 'Select one or more groups.' section includes a dropdown menu with 'Historic Architecture' and 'Archaeology' selected. Below this, the 'Select your request types.' section has a note: 'To delete a work request, click the "x" next to the work request type.' The 'HES Section' dropdown menu is open, showing four options: '[HA] Adverse Effects Determination & MOA x', '[A] Adverse Effects Determination & MOA x', 'Comprehensive Survey & Eligibility (EIS) x', and 'Comprehensive Survey & Site Evaluation x'.

The 'Requests' section is active, showing a list of requests. The first request is 'Historic Architecture - [HA] Adverse Effects Determination & MOA'. It has tabs for 'Request Details', 'Milestones', and 'Documents'. The 'Request Details' tab is selected, showing a 'Due Date' field with a placeholder 'mm/dd/yyyy' and a note 'Please allow 6 Months of lead time'. Below this is a 'Notes' section with a text area.

The second request in the list is 'Archaeology - [A] Adverse Effects Determination & MOA'.

2. Enter a Due Date using the calendar.



NC DOT ETRACS Hello, aabarnestest

Dashboard New Request About Settings User Guide Log Out

Create Request TIP:A-0009 | Sub-TIP: N/A | WBS: 32572.3.9

Select one or more groups.
To delete a group, click the "x" next to the group name (NOTE: To remove a group, you must remove all the request types from that group if any are selected).

Historic Architecture Archaeology

Select your request types.
To delete a work request, click the "x" next to the work request type.

HES Section

[HA] Adverse Effects Determination & MOA x
[A] Adverse Effects Determination & MOA x
Comprehensive Survey & Eligibility (EIS) x
Comprehensive Survey & Site Evaluation x

Requests

Historic Architecture - [HA] Adverse Effects Determination & MOA

View on Map Delete Submit Save

Request Details Milestones Documents

Due Date*
mm/dd/yyyy

March 2016

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

Archaeology - [A] Adverse Effects Determination & MOA

3. Add your notes in the large text box.

NC DOT ETRACS Hello, aabarnestest

Dashboard New Request About Settings User Guide Log Out

Create Request TIP:A-0009 | Sub-TIP: N/A | WBS: 32572.3.9

Select one or more groups.
To delete a group, click the "x" next to the group name (NOTE: To remove a group, you must remove all the request types from that group if any are selected).

Historic Architecture Archaeology

Select your request types.
To delete a work request, click the "x" next to the work request type.

HES Section

[HA] Adverse Effects Determination & MOA x
[A] Adverse Effects Determination & MOA x
Comprehensive Survey & Eligibility (EIS) x
Comprehensive Survey & Site Evaluation x

Requests

Historic Architecture - [HA] Adverse Effects Determination & MOA

View on Map Delete Submit Save

Request Details Milestones Documents

Due Date*
03/31/2016

Please allow 6 Months of lead time

Notes

Archaeology - [A] Adverse Effects Determination & MOA

3.3.2 Milestones Tab

4. Click on the Milestones Tab. The Milestones screen appears.

The screenshot shows the ETRACS web application interface. At the top, there is a header with the NCDOT logo and the text "Hello, aabarnestest". Below the header is a navigation bar with links for "Dashboard", "New Request", and "About". On the right side of the navigation bar are links for "Settings", "User Guide", and "Log Out".

The main content area is titled "Create Request" and displays the following information: "TIP:A-0009 | Sub-TIP: N/A | WBS: 32572.3.9". Below this, there are three buttons: "Close Request Types", "Save All", and "Submit All".

The "Select one or more groups." section contains a dropdown menu with "Historic Architecture" and "Archaeology" selected. Below this is the "Select your request types." section, which contains a list of request types: "[HA] Adverse Effects Determination & MOA", "[A] Adverse Effects Determination & MOA", "Comprehensive Survey & Eligibility (EIS)", and "Comprehensive Survey & Site Evaluation".

The "Requests" section displays a table of requests. The "Milestones" tab is highlighted with a yellow circle. The table has the following columns: "Usage Number", "Description", "Basic Date", and "Actual Completion Date". The table contains one row with the following data:

Usage Number	Description	Basic Date	Actual Completion Date
M0116	Archaeology MOA (ARCH_MOA)	3/9/2016	3/9/2016

Below the table, there are three expandable sections: "Archaeology - [A] Adverse Effects Determination & MOA", "Historic Architecture - Comprehensive Survey & Eligibility (EIS)", and "Archaeology - Comprehensive Survey & Site Evaluation".

5. Check the information that has come from STaRS/SAP. You may not update. Check the milestone list to ensure you are at the proper WBS level.

3.3.3 Documents Tab

6. Click on the Documents Tab. The Documents screen appears.

The screenshot shows the ETRACS web application interface. At the top, there's a navigation bar with the ETRACS logo and user information. Below it, a 'Create Request' section displays project identifiers: TIP:A-0009, Sub-TIP: A-0009, and WBS: 32572.4. The main area is divided into two columns. The left column contains instructions for selecting groups and request types, with a dropdown menu showing 'Historic Architecture' and 'Archaeology'. The right column, titled 'Requests', shows a list of request types. The 'Documents' tab is highlighted with a yellow circle. Below the tabs, there are input fields for 'Vicinity Map', 'Current Design Files', 'Agency Input Letters', 'Aerial photo w/Study Area', and 'Project Termini & Y lines'.

This screen will have no pre-populated information and may be quite large.

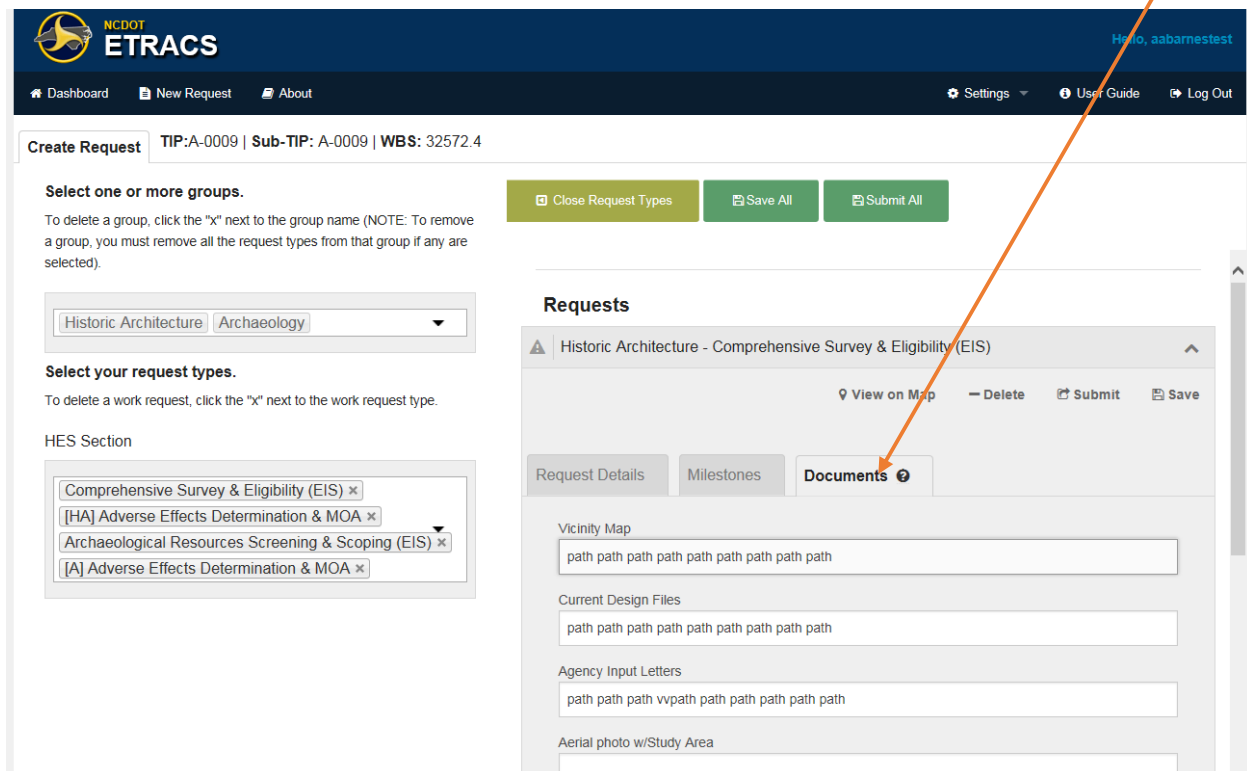
NOTE: some documents are required and are marked with a red asterisk (*).

NOTE: each request type has its own unique set of required and optional documents.

7. Using the location that is in the project's Project Store directory, enter the path to each document. When you are adding a document path:
 - a. Make sure that your Y: drive is mapped to Project Store
 - b. Browse to the file using **Windows Internet Explorer**.
 - c. Shift-Right-Click on the file.
 - d. Select Copy as Path.
 - e. Paste the path into the text box, removing the quotation marks around the link.

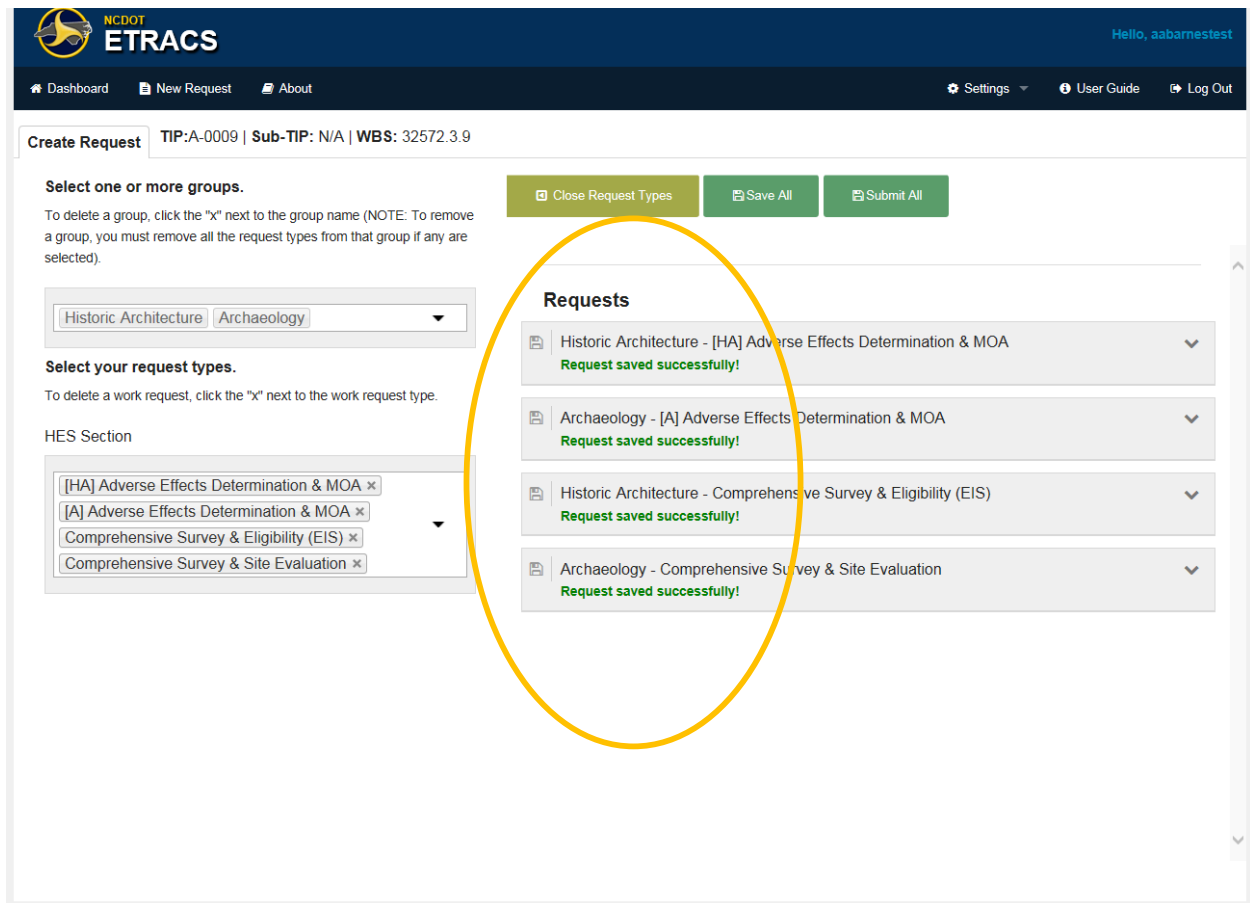
User Tips: Always use **Windows Internet Explorer** to capture and view the documents.

These instructions are also in Tool Tips on any screen that requires document links. Look for the ?



8. Save each request as you complete it. You will see a message **Request saved successfully!**
9. Close the completed request with the up arrow▲.
10. For each request, return to Section 3.3 Create Request – Step 3 Create Request Details and repeat the steps for each request.

When you have completed and saved all the requests for this project, your screen will show the **Request saved successfully!** message for each request. There is also now a “save” icon in the form of a floppy disk.



ETRACS Hello, aabarnestest

Dashboard New Request About Settings User Guide Log Out

Create Request TIP:A-0009 | Sub-TIP: N/A | WBS: 32572.3.9

Select one or more groups.

To delete a group, click the "x" next to the group name (NOTE: To remove a group, you must remove all the request types from that group if any are selected).

Historic Architecture Archaeology

Select your request types.

To delete a work request, click the "x" next to the work request type.

HES Section

[HA] Adverse Effects Determination & MOA x
[A] Adverse Effects Determination & MOA x
Comprehensive Survey & Eligibility (EIS) x
Comprehensive Survey & Site Evaluation x

Close Request Types Save All Submit All

Requests

- Historic Architecture - [HA] Adverse Effects Determination & MOA
Request saved successfully!
- Archaeology - [A] Adverse Effects Determination & MOA
Request saved successfully!
- Historic Architecture - Comprehensive Survey & Eligibility (EIS)
Request saved successfully!
- Archaeology - Comprehensive Survey & Site Evaluation
Request saved successfully!

Screen Tip: These instructions suggest saving each request so that ETRACS can help you by verifying each request in turn. When you are more familiar with ETRACS and all the request

types, you may choose to complete all the request details without saving each request, but rather by saving them all when they are all complete. In this case, use the Save All button.

Screen Tip: As you work through creating and adding all the information to your requests, note that the TIP#, Sub-TIP# and WBS# are shown on the screen. This will prove helpful if you want to check to be sure you recall which project you are working with.

The screenshot shows the ETRACS 'Create Request' interface. At the top, the NCDOT ETRACS logo is on the left, and the user 'Hello, aabarnestest' is on the right. Below the logo, navigation links for 'Dashboard', 'New Request', and 'About' are visible. The main header area, highlighted by a yellow circle, displays 'Create Request' and the project identifiers: 'TIP: N/A | Sub-TIP: N/A | WBS: 12C.036002'. Below this, there are buttons for 'Close Request Types', 'Save All', and 'Submit All'. The 'Select one or more groups' section shows 'Historic Architecture' and 'Archaeology' selected. The 'Select your request types' section lists various request types under the 'HES Section'. On the right, a 'Requests' list shows several saved requests, each with a 'Request saved successfully!' message. The bottom of the page shows a zoom level of 100%.

NOTE: you can also save your work at any time in the process of creating the request. However, you will not be able to submit them (next step) until all the information and required documents are included.

ETRACS Hello, aabarnestest

Dashboard New Request About Settings Log Out

Create Request TIP: N/A | Sub-TIP: N/A | WBS: 12C.036002

Select one or more groups.
To delete a group, click the "x" next to the group name (NOTE: To remove a group, you must remove all the request types from that group if any are selected).

Historic Architecture x Archaeology x

Select your request types.
To delete a work request, click the "x" next to the work request type.

HES Section

[HA] Adverse Effects Determination & MOA x
Certificate of Appropriateness (COA) x
[HA] Cult Res Scrmg Surv & Elig (CE, EA & Min Crit Proj) x
Effects Assessment x
Comprehensive Survey & Eligibility (EIS) x
Environmental Document/Permit Application Review x
Mitigation Reports & Documentation, Landscape Plans x
[A] Adverse Effects Determination & MOA x
Archaeological Resources Screening & Scoping (EIS) x
Comprehensive Survey & Site Evaluation x
[A] Cult Res PA Scrmg & Surv (CE, EA & Min Crit Proj) x
Data Recovery x
Environmental Document/Permit Review x

Close Request types Save All Submit All

Common Documents

Requests

Historic Architecture - [HA] Adverse Effects Determination & MOA
Request saved successfully!

Historic Architecture - Certificate of Appropriateness (COA)
Request saved successfully!

Historic Architecture - [HA] Cult Res Scrmg Surv & Elig (CE, EA & Min Crit Proj)
Request saved successfully!

Historic Architecture - Effects Assessment
Request saved successfully!

Historic Architecture - Comprehensive Survey & Eligibility (EIS)
Request saved successfully!

Historic Architecture - Environmental Document/Permit Application Review
Request saved successfully!

100%

When your requests have been successfully saved, they are in the ETRACS system and will show on your dashboard as IN DRAFT.

3.4 Create Request – Step 4 Submit the Request

11. Click on the Submit All button. NOTE: if you are creating a single request, just use the Submit button on the request screen.

The Request now moves to Requested status. You will be taken to the Link Memo screen.

3.4.1 Generate Memo and Notifications

12. Hover over the top of the memo to find the print option.

13. Save the memo to Project Store using the Save icon and using the instructions on the screen.

NOTE: If you are an external consultant, or for any reason do not have access to Project Store, follow your normal procedure for submitting documents to PDEA.

The screenshot shows the 'Link Memo' interface. At the top, a yellow circle highlights three numbered instructions:

1. Click the "Save" icon on the PDF file below to save this file to Project Store (Y: Drive).
2. Find the file you saved. Hold down the Shift key and right-click on the file and select "Copy as Path".
3. Paste the path into the box below.

Below the instructions is a text input field. Underneath the field is a blue button labeled 'Link Memo' with a circular arrow icon.

The main content area displays a memorandum template. On the right side, it shows project details: TIP: A-0009A, WBS: 32572.2.1, and County(ies): Brunswick. The memorandum body includes:

- MEMORANDUM TO: Hes Sectionhead, HES Section Head
- FROM: Alice A bArnes , PM
- SUBJECT: Request for Environmental Input

The body text reads: "Your assistance is requested in providing environmental input for the project described below. Information concerning the proposed project is provided to assist your staff in their investigations. If you are unable to meet the schedule shown below, please let me know."

Below the text, there is a section for 'Request Types' with a note '- see details below'. It contains two radio button options: ☐ Certificate of Appropriateness (COA) and ☒ [A] Adverse Effects Determination & MOA.

At the bottom, there is a 'Project Description' section with the same project details: TIP: A-0009A, WBS: 32572.2.1, County: Brunswick, and Let Date: [blank].

14. Paste the path to link the memo to the notification.

Link Memo

Enter the path to the memo you just saved to link it to this request.

<https://ncconnect.sharepoint.com/sites/pwa/PDEA%20Tracking%20Upgrade/Shared%20Documents/TEST%20RequestMemo.pdf>

Link Memo

Project ID: R-5252
WBS: 45012.1.1.1
County(ies): Alamance

MEMORANDUM TO: Hes Sectionhead, Section Head
Alice A bArnes, Project Manager

FROM: Alice A bArnes, Project Manager

SUBJECT: Request for Environmental Input

Your assistance is requested in providing environmental input for the project described below. Information concerning the proposed project is provided to assist your staff in their investigations. If you are unable to meet the schedule shown below, please let me know.

Request Types – see details below
☒ Adverse Effects Determination & MOA

Project Description
TIP/ID: R-5252
WBS: 45012.1.1.1
County: Alamance

15. Click Link Memo.

The Request Notification preview will appear.

16. Preview the notifications:

- a. For your convenience, a copy of this memo will be sent to your Outlook email. You may forward the email, along with any extra documents you have attached, to anyone in DOT's email system, as well as from your personal Outlook contact list.
- b. (Optional) Include your own message along with the system-generated information.
- c. (Optional) Attach links to any additional documents. NOTE: be aware that files linked in this memo are not stored in ETRACS.
- d. Scroll down to see that ETRACS has included the information about the projects, as well as for all of the requests you just created.

Request Notification

Send request notifications

Your Request will be sent to the following people with the attached memo you linked:

Alice Barnes, EnginEERING Managertwo

For your convenience, a copy of this memo will be sent to your Outlook email. You may forward the email, along with any extra documents you have attached, to anyone in DOT's email system, as well as from your personal Outlook contact list.

Enter the subject line of the email address
This is a message to notify you that a request has been made.

You can also enter your own message which will be included in the notification.

Attach any additional documents you would like here.
Attached files are not stored in the ETRACS system.

Send Notification **Cancel**

Notification preview:

TIP:
WBS: 12C.036002
County: Gaston

Memorandum To: Hes Sectionhead
From: aabarnes@ncdot.gov
SUBJECT: This is a message to notify you that a request has been made.

17. If you see problems with any of the requests, press Cancel. You will be returned to the Create Request screen. You can edit the request details or delete work request(s) if you need to. To delete a request, use the X button located in the left panel. You will be prompted to be sure you want to delete it.

The screenshot shows the ETRACS 'Create Request' interface. At the top, there's a header with the NCDOT logo and 'ETRACS' text. Below the header, there are navigation links: Dashboard, New Request, and About. On the right, there are links for Settings and Log Out. The main content area is titled 'Create Request' and includes fields for TIP: N/A, Sub-TIP: N/A, and WBS: 12C.036002. There are three buttons: Close Request Types, Save All, and Submit All. A section titled 'Select one or more groups.' contains a list of groups: Historic Architecture and Archaeology. Below this, a section titled 'Select your request types.' contains a list of request types. A yellow arrow points to the 'X' button next to the '[HA] Cult Res Scrmg Surv & Elig (CE, EA & Min Crit Proj)' request type. A modal dialog titled 'Delete Work Request ?' is open, asking 'This will delete this work request. Are you sure you want to do this?' with 'Ok' and 'Cancel' buttons.

18. When you are satisfied with the information in the notification, click the Send Notification button.

Request Notification

Send request notifications

Your Request will be sent to the following people with the attached memo you linked:

Alice Barnes, EnginEERING Managertwo

For your convenience, a copy of this memo will be sent to your Outlook email. You may forward the email, along with any extra documents you have attached, to anyone in DOT's email system, as well as from your personal Outlook contact list.

Enter the subject line of the email address
This is a message to notify you that a request has been made.

You can also enter your own message which will be included in the notification.

Attach any additional documents you would like here.
Attached files are not stored in the ETRACS system.

Send Notification **Cancel**

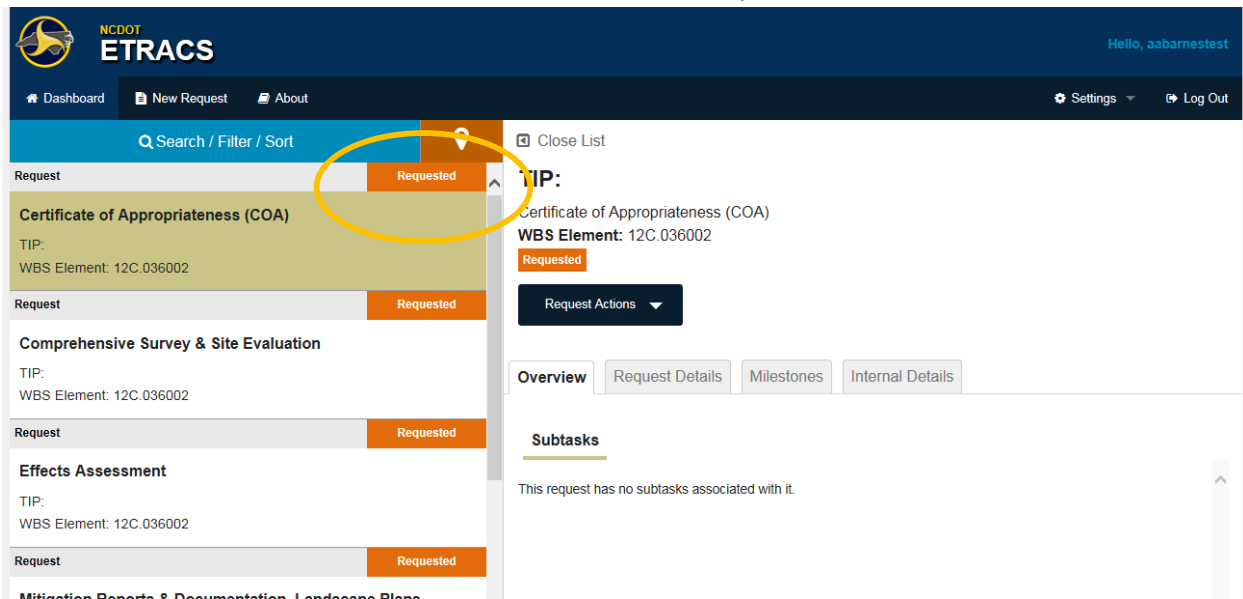
Notification preview:

TIP:
WBS: 12C.036002
County: Gaston

Memorandum To: Hes Sectionhead
From: aabarnes@ncdot.gov
SUBJECT: This is a message to notify you that a request has been made.

You will receive a message that your request has been submitted successfully. ETRACS sends the request notification to the appropriate Outlook inboxes: the section head, group supervisor, requestor, and any additional people whom you selected.

ETRACS returns to the Dashboard. On the Dashboard, the requests will all have the status **REQUESTED**.



4 Assign Request – For the Supervisor

Now that the requests have been created and requested, the request status is **REQUESTED**, and the supervisor can assign each one appropriately to a specialist to do the work.

NOTE: If the request is not correct for any reason, the Supervisor may return the Request to the Requestor. See the instructions in Section 5.2 Return Request – For the Specialist and the Supervisor, below.

1. Review all of the information that has been created in the request by the requestor, as outlined in the preceding process, Section 3 “Request Functions – For the Requestor.” The only tabs with information at this point are Request Details and Milestones.

The screenshot displays the NCDOT ETRACS interface. On the left, a sidebar lists several requests, each with a 'Request' button and a 'Requested' status. The requests include 'Comprehensive Survey & Site Evaluation' (TIP: A-0009, WBS Element: 32572.5), '[A] Adverse Effects Determination & MOA' (TIP: A-0009, WBS Element: 32572.5), 'Comprehensive Survey & Site Evaluation' (TIP: A-0009, WBS Element: 32572.3.9), '[A] Adverse Effects Determination & MOA' (TIP: A-0009, WBS Element: 32572.3.9), '[A] Adverse Effects Determination & MOA' (TIP: A-0009, WBS Element: 50010.1.1.3), and 'Data Recovery' (TIP: A-0009).

The main content area shows the details for the selected request, TIP: A-0009. The 'Request Details' tab is highlighted with a yellow circle. The details include:

- Request:** Comprehensive Survey & Site Evaluation
- WBS Element:** 32572.5
- Status:** Requested
- Request Actions:** (Dropdown menu)
- Overview:** (Tab)
- Request Details:** (Tab, highlighted)
- Milestones:** (Tab)
- Internal Details:** (Tab)
- On Behalf Of:** Submitted to: Arch E Supervisor, Ecap E Supervisor
- Original Due Date:** 4/23/2016
- Assigned to:** Unassigned
- Proposed Revised Due Date:** Revised Due Date: Please allow a lead time of 6 Months
- Actual Completion Date:** Requester: Alice A Barnes
- Deliverables:** (Section)
- Documents:** (Section)
- Current Design Files:** (Link)
- Notes:** (Section)

- From the Dashboard, highlight the request on the left-hand panel, click on the Request Actions button, and select Assign.

The screenshot displays the ETRACS (Environmental Tracking and Reporting and Assessment System) interface. The top navigation bar includes the NCDOT logo, the user's name 'Hello, archsupervisor', and links for Settings, User Guide, and Log Out. The main content area is divided into two panels. The left panel, titled 'Request', lists several requests with their titles, TIP numbers, and WBS Element IDs. The right panel shows the details for the selected request, 'TIP: A-0009 Comprehensive Survey & Site Evaluation'. This panel includes a 'Request Actions' dropdown menu, which is open, showing options like 'Return', 'View/Update', 'Log', 'Assign', 'New Subtask', 'View Map', and 'View Project Info'. The 'Assign' option is highlighted with a yellow circle. Below the dropdown, there are tabs for 'Details', 'Milestones', and 'Internal Details'. The 'Details' tab is active, showing fields for 'Submitted to', 'Assigned to', 'Revised Due Date', 'Actual Completion Date', and 'Requester'. There are also sections for 'Deliverables', 'Documents', and 'Notes'.

Request List (Left Panel):

- Request** **Requested**
Comprehensive Survey & Site Evaluation
TIP: A-0009
WBS Element: 32572.5
- Request** **Requested**
[A] Adverse Effects Determination & MOA
TIP: A-0009
WBS Element: 32572.5
- Request** **Requested**
Comprehensive Survey & Site Evaluation
TIP: A-0009
WBS Element: 32572.3.9
- Request** **Requested**
[A] Adverse Effects Determination & MOA
TIP: A-0009
WBS Element: 32572.3.9
- Request** **Requested**
[A] Adverse Effects Determination & MOA
TIP: A-0009
WBS Element: 50010.1.1.3
- Request** **Requested**
Data Recovery
TIP: A-0009
WBS Element: 32572.3

Request Details (Right Panel):

TIP: A-0009
Comprehensive Survey & Site Evaluation
WBS Element: 32572.5
Requested

Request Actions

- Return
- View/Update
- Log
- Assign**
- New Subtask
- View Map
- View Project Info

Details **Milestones** **Internal Details**

Submitted to:
Arch E Supervisor
Ecap E Supervisor

Assigned to:
Unassigned

Revised Due Date:
Please allow a lead time of 6 Months

Actual Completion Date:

Requester:
Alice A Barnes

Deliverables

Documents
[Current Design Files](#)

Notes

A blank Assign Request screen appears.

The screenshot shows the 'Assign Request' form with the following sections:

- Assign To:** A dropdown menu with 'Select' as the placeholder text.
- Internal Due Date:** A text input field.
- Deliverables:** A list of checkboxes for selecting deliverables:
 - ☐ Site Survey and Evaluation Draft Report
 - ☐ Archaeological Site Forms
 - ☐ Site Survey and Evaluation Final Report
 - ☐ GIS files
 - ☐ Curated Artifacts
- Add Additional Deliverables:** A text input field with a blue '+ Add Additional Deliverables' link below it.
- Buttons:** 'Assign Request' (green) and 'Cancel' (white with black border).

At the top right of the form, it displays: TIP: A-0009 | Sub-TIP: N/A | WBS: 32572.5. At the bottom left, it says 'WBS Element: 32572.3'.

3. Select the person you wish to assign the request to.

NOTE: you may also assign a request to yourself if you are in the appropriate user group.

4. Select the Internal Due Date either typing the date or using the calendar. You can use the Internal Due Date to give everyone a buffer of time for internal review before the request due date.
5. Select the deliverable(s) that must be completed. Add the **name** of any additional deliverable(s) that are needed.
6. Scroll down to use the large text box for internal notes that are going to the assignee.

7. When you are satisfied with the information, click the Assign Request button.

Assign Request

TIP: A-0009 | Sub-TIP: N/A | WBS: 32572.5

Assign To

Select the person to assign this request to:

Intspecialist,Arch E

Internal Due Date

Internal Due Date

03/10/2017

Deliverables

- ☐ Site Survey and Evaluation Draft Report
- ☒ Archaeological Site Forms
- ☐ Site Survey and Evaluation Final Report
- ☐ GIS files
- ☐ Curated Artifacts

Add Additional Deliverables

[+ Add Additional Deliverables](#)

Assign Request **Cancel**

You will receive a message that you have **successfully assigned the request**. The request is now shown on the Dashboard as **ASSIGNED**.

5 Review Request – For the Specialist

Once the request is assigned, as in Section 4 Assign Request, the specialist who has been assigned will see it in their dashboard with the status ASSIGNED. If you are assigned a request:

1. Highlight the request on the left-hand panel. Review the request tabs: Overview, Request Details, Milestones, and Internal Details.

The screenshot displays the NCDOT ETRACS interface. The top navigation bar includes the NCDOT logo, the text 'Hello, aabarnestest', and links for Settings, User Guide, and Log Out. Below this is a search bar and a 'Close List' button. The left-hand panel shows a list of requests under the heading 'Project'. The first request is 'I-26 (US 19-23)FROM NORTH OF I-240 IN ASHEVILLE T ...' with TIP: A-0010 and WBS Element: 32573.1.9.3. The second request is '[HA] Adverse Effects Determination & MOA' with TIP: A-0010 and WBS Element: 32573.1.9.3. This second request is highlighted with a yellow circle, and its status is 'Assigned'. The right-hand panel shows the details for the selected request, 'TIP: A-0010'. It includes tabs for Overview, Request Details, Milestones, and Internal Details. The 'Overview' tab is active, showing the request title '[HA] Adverse Effects Determination & MOA', TIP: A-0010, and WBS Element: 32573.1.9.3. Below the tabs, there is a 'Subtasks' section with the text 'This request has no subtasks associated with it.'

2. Take note of the dates and other information on the Request Details tab.

The screenshot displays the NCDOT ETRACS interface. On the left, a list of requests is shown with their status: 'Requested', 'In Progress', 'Waiting HPO', and 'In Draft'. The main panel shows the details for 'TIP: A-0009' with the title 'PDEA Consultant Workday Estimate' and 'WBS Element: 32572.1.1'. The status is 'In Progress'. Below this, there are tabs for 'Overview', 'Request Details' (which is highlighted with a yellow circle), 'Milestones', and 'Internal Details'. The 'Request Details' tab contains fields for 'On Behalf Of', 'Submitted to', 'Original Due Date: 9/17/2015', 'Assigned to: AliceA bArnes', 'Proposed Revised Due Date:', 'Revised Due Date: Please allow a lead time of 2 Weeks', 'Actual Completion Date:', 'Deliverables', 'Common Documents' (with a link to 'Project Initiation Meeting Minutes'), 'Documents' (with a link to 'Aerial photos w/ Study Area'), and 'Additional Messages'.

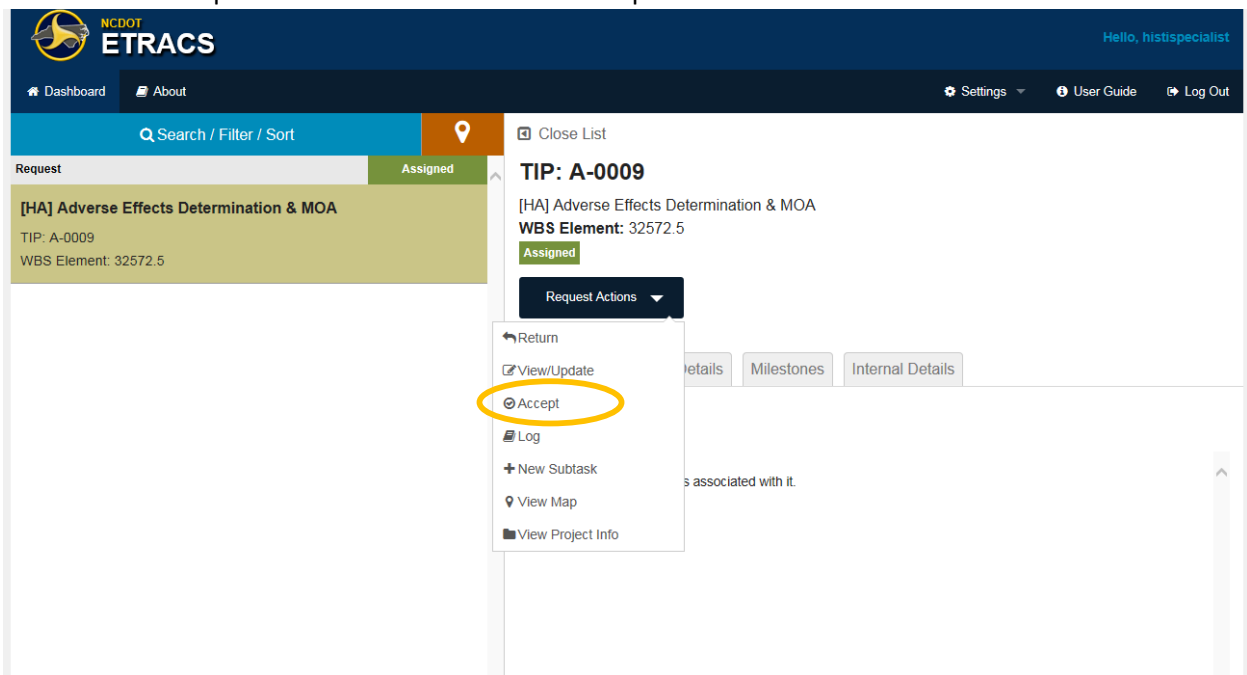
3. After reviewing the Request Details:

- If everything is in order, you accept the request. Continue with Section 5.1 Accept Request.
- If there is some problem with the request, you will need to return it to your supervisor or to the requestor. Continue with Section 5.2 Return Request.

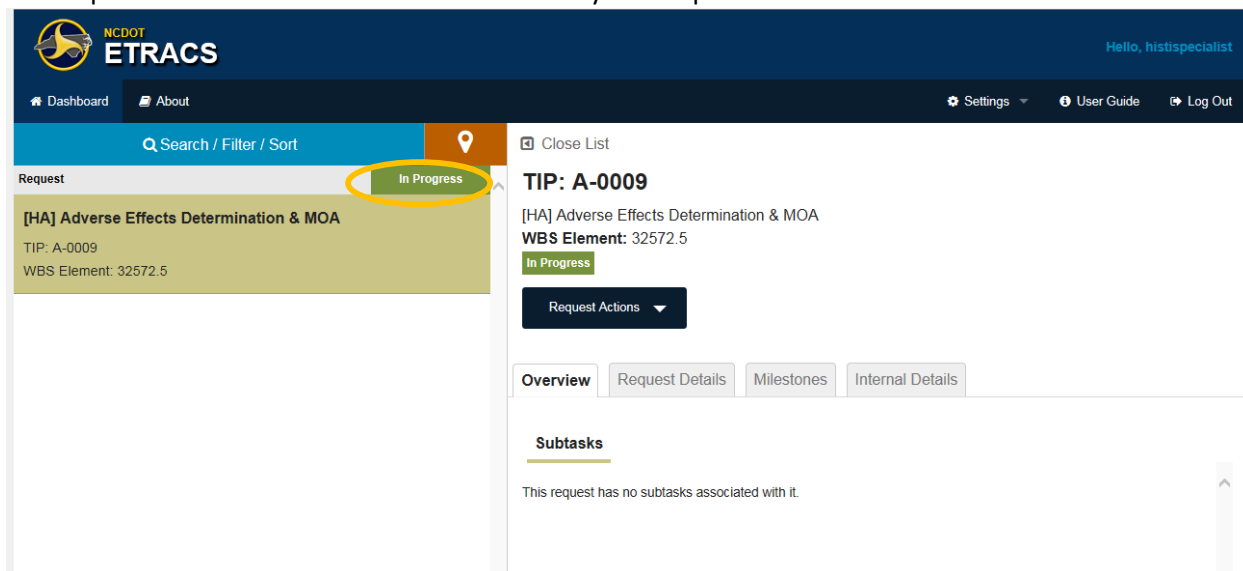
5.1 Accept Request – For the Specialist

If you find everything in order:

1. Pull down the Request Actions menu and select Accept.



The request will now show as IN PROGRESS until you complete the work.



Continue to Section 5.4 Update / Complete Request – For Specialists.

5.2 Return Request – For the Specialist and the Supervisor

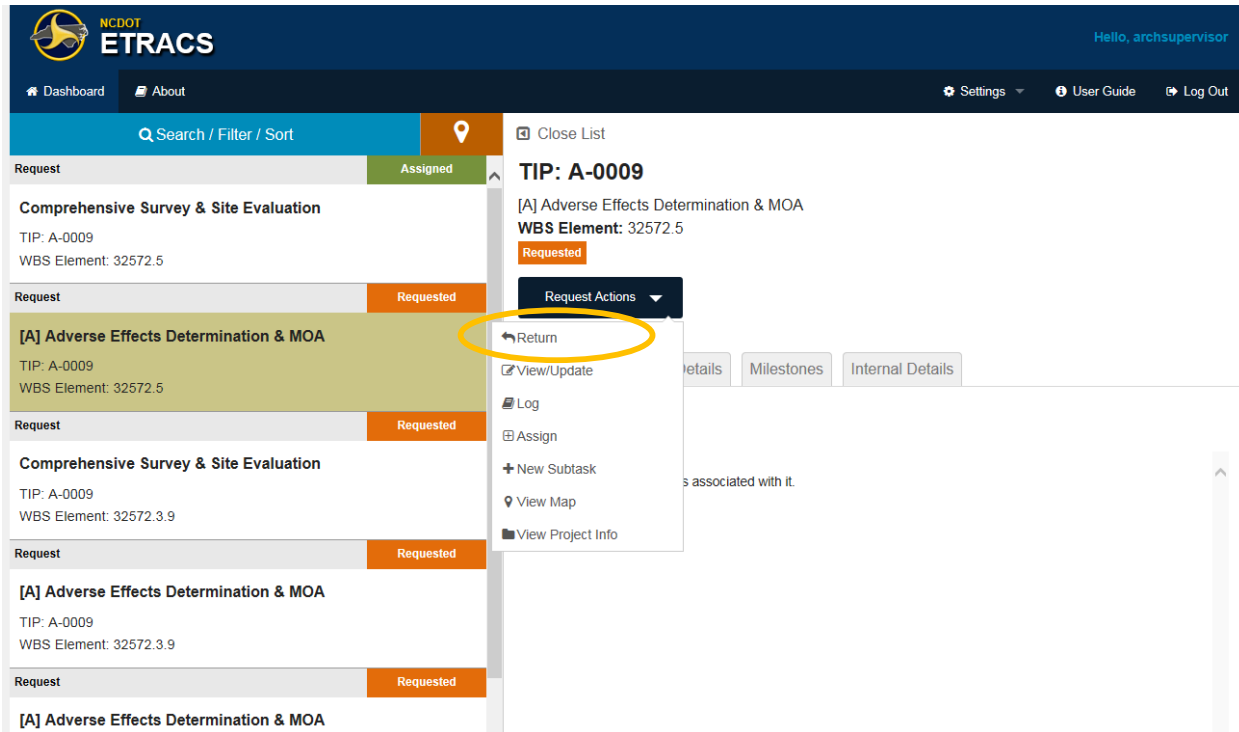
If the supervisor finds some problem with the request, they will return it to the requestor. In that case, the status goes from **REQUESTED** to **RETURNED**.

If the specialist who has received the assignment is not able to perform this request for some reason, or is not able to meet the date requested, the assignee would return the request to the supervisor. In that case, the status goes from **ASSIGNED** to **RETURNED**.

NOTE: the specialist is also able to return back to the requestor, but the supervisor should be asked first if that is appropriate.

In both cases (supervisor or specialist), the functionality is the same and is described below.

1. Highlight the request on the left-hand panel, click on the Request Actions button, and select Return.



The Return Request window appears.

2. Fill out the appropriate information: the **appropriate person** to Return to, Reason for Return, radio button to indicate whether you want to propose a new date, and date (if you are proposing a new date).

The screenshot shows the ETRACS web application interface. The main header includes the NCDOT logo, the text "ETRACS", and a user greeting "Hello, aabarnestest". The navigation bar contains links for "Dashboard", "New Request", "Reports", and "About". A search bar is located below the navigation bar. The main content area displays a list of requests on the left and a "Return Request" dialog box in the center. The dialog box is titled "Return Request" and contains the following fields:

- Return to:** A dropdown menu showing "A bArnes, Alice".
- Reason for Return:** A text area containing "I simply cannot meet this date. I have things to do."
- I would like to propose a new date:** Radio buttons for "Yes" (selected) and "No".
- New date:** A date input field showing "05/05/2016".
- Buttons:** "Return Request" (highlighted with a yellow circle) and "Cancel".

3. Click the Return Request button.

You will receive a message that you have **successfully returned the request**.

The request returns to the appropriate person's dashboard with the status **RETURNED**. See Section 5.3 Act on Returned Requests.

The screenshot displays the ETRACS dashboard interface. At the top, the NCDOT logo and 'ETRACS' title are visible, along with a user greeting 'Hello, archsupervisor'. Navigation links for 'Dashboard', 'About', 'Settings', 'User Guide', and 'Log Out' are present. A search bar labeled 'Search / Filter / Sort' and a 'Close List' button are also shown. The main content area features a list of requests on the left and a detailed view of a selected request on the right. The list includes requests with titles like 'Comprehensive Survey & Site Evaluation' and '[A] Adverse Effects Determination & MOA', each with associated TIP and WBS Element numbers. The status of each request is indicated by a colored button: 'Assigned' (green), 'Returned' (green), and 'Requested' (orange). The detailed view on the right shows the selected request 'TIP: A-0009' with a 'Returned' status, a 'Request Actions' dropdown menu, and tabs for 'Overview', 'Request Details', 'Milestones', and 'Internal Details'. The 'Overview' tab is active, showing a 'Subtasks' section with the message 'This request has no subtasks associated with it.'

5.3 Act on Returned Requests

When a request has been returned, the requestor or supervisor may take a number of different actions, depending upon the reason for the return. See the following sections:

- Negotiate / Change the Due Date of Information (supervisor or requestor)
- Update Project Information (requestor)
- Submit the Request (requestor)
- Reassign the Request (supervisor)
- Delete the Request (requestor)

User Tip: The actions available to you are entirely dependent upon your role! In order to see **only** the returned requests that need your action, change the Search / Filter / Sort on the dashboard to see only My Work and Returned status.

5.3.1 Negotiate / Change the Due Date or Information

1. With the request highlighted on the left-hand screen, review the Proposed Revised Due Date and the message that was included in the return.

The screenshot displays the NCDOT ETRACS interface. On the left, a list of requests is shown, including 'Adverse Effects Determination & MOA', 'Cultural Resources PA (CE & Minimum Criteria Projects)', 'Benthic survey', 'General Mailing List', 'Land Use Scenario Assessment (LUSA)', and 'PDEA Consultant Report Review'. The 'General Mailing List' request is highlighted. On the right, the details for request TIP: A-0009 are shown. The 'Proposed Revised Due Date' is highlighted in yellow. The details pane includes sections for 'Original Due Date', 'Assigned to', 'Revised Due Date', 'Actual Completion Date', 'Deliverables', 'Common Documents', 'Documents', and 'Additional messages'.

Request List (Left):

- Adverse Effects Determination & MOA**
TIP: R-5252
WBS Element: 45012.1.1.1
Status: In Draft
- Cultural Resources PA (CE & Minimum Criteria Projects)**
TIP: R-5252
WBS Element: 45012.1.1.1
Status: In Progress
- Benthic survey**
TIP: A-0009
WBS Element: 32572.1.1
Status: Returned
- General Mailing List**
TIP: A-0009
WBS Element: 32572.1.1
Status: In Draft
- Land Use Scenario Assessment (LUSA)**
TIP: A-0009
WBS Element: 32572.1.1
Status: In Draft
- PDEA Consultant Report Review**
TIP: A-0009
WBS Element: 32572.1.1
Status: In Draft

Request Details (Right):

TIP: A-0009
General Mailing List
WBS Element: 32572.1.1
Status: Returned

Request Actions

Overview | Request Details | Milestones | Internal Details

Original Due Date: 9/26/2015
Proposed Revised Due Date: 5/5/2016
Actual Completion Date:

Assigned to: AliceA bArnes
Revised Due Date: Please allow a lead time of 15 Days

Deliverables

Common Documents
These documents are used by more than one request for this project.
[Project study area \(shape file\)](#)
[Property Contact Mailing list](#)

Documents

Additional messages
Alice A bArnes on 9/23/2015 4:51:33 PM
adsfdfsdfa

User Tip: Both the requestor and supervisor can negotiate and change due dates and other request information.

2. Use the View/Update functionality to review and change information as needed.

The screenshot displays the ETRACS web application interface. The top navigation bar includes the NCDOT logo, the text "ETRACS", and a user greeting "Hello, aabarnestest". Below this, there are links for "Dashboard", "New Request", and "About". A search bar with the text "Search / Filter / Sort" is also present. The main content area is divided into a left sidebar and a right pane. The sidebar lists several requests, each with a status button: "Requested" (orange), "In Progress" (green), and "Assigned" (green). The "Effects Assessment" request is highlighted in yellow. The right pane shows the details for the selected request, "TIP: I-5110", including "Effects Assessment" and "WBS Element: 42345.3". A "Request Actions" dropdown menu is open, showing options: "Return", "View/Update" (highlighted with a yellow circle), "Log", "Assign", "View Map", "View Project Info", and "Delete Request". The "View/Update" option is the focus of the instruction. Below the dropdown, there are tabs for "Details", "Milestones", and "Internal Details". The "Details" tab is active, showing information such as "Submitted to: EnginEeringManagertwo", "Assigned to: Unassigned", "Revised Due Date: 12/16/2015", and "Please allow a lead time of 6 Months". There are also sections for "Actual Completion Date:", "Deliverables", and "Common Documents".

The View/Update Request screen appears.

3. For the Proposed Revised Due Date, accept it or change it using the Revised Due Date field.

View/Update Request

TIP: A-0009 | Sub-TIP: N/A | WBS: 32572.5

Request Details | Milestones | Internal Details

Status
Returned

Request details

Requested by:
Alice Barnes on 4/1/2016

Submitted to:
Arch Supervisor, Ecap Supervisor

Assigned to:
Alice Barnes

Proposed Revised Due Date:
9/21/2016

Original Due Date: *
4/21/2016

Actual Completion Date:

Revised Due Date:

Please allow a lead time of 6 Months

Deliverables

Findings of Adverse Effects

Add document path

Save **Cancel**

Notes

4. Scroll down to review / add documents. You can also Add a Note and View All Notes for this request.

The screenshot shows the 'View/Update Request' interface. A yellow circle highlights the 'Request Details' tab and the document and notes sections. The document section includes fields for 'Scoping Meeting Minutes', 'USGS Quad Map', 'Designated Lead Federal Agency', and 'Current Design Files', each with an 'Add document path' field. Below these is a 'Document Name' field, another 'Add document path' field, and a '+ Add Additional Document' button. The notes section has a 'Notes' header, an 'Add a note' text area, and a 'View all notes' link. At the bottom are 'Save' and 'Cancel' buttons. The top right shows 'TIP: A-0009 | Sub-TIP: N/A | WBS: 32572.5'. The left sidebar shows a list of requests with 'TIP' and 'WB' indicators.

View/Update Request

TIP: A-0009 | Sub-TIP: N/A | WBS: 32572.5

Request Details | Milestones | Internal Details

Scoping Meeting Minutes

USGS Quad Map*

Designated Lead Federal Agency*

Current Design Files*

Document Name

Add document path

[+ Add Additional Document](#)

Notes

Add a note

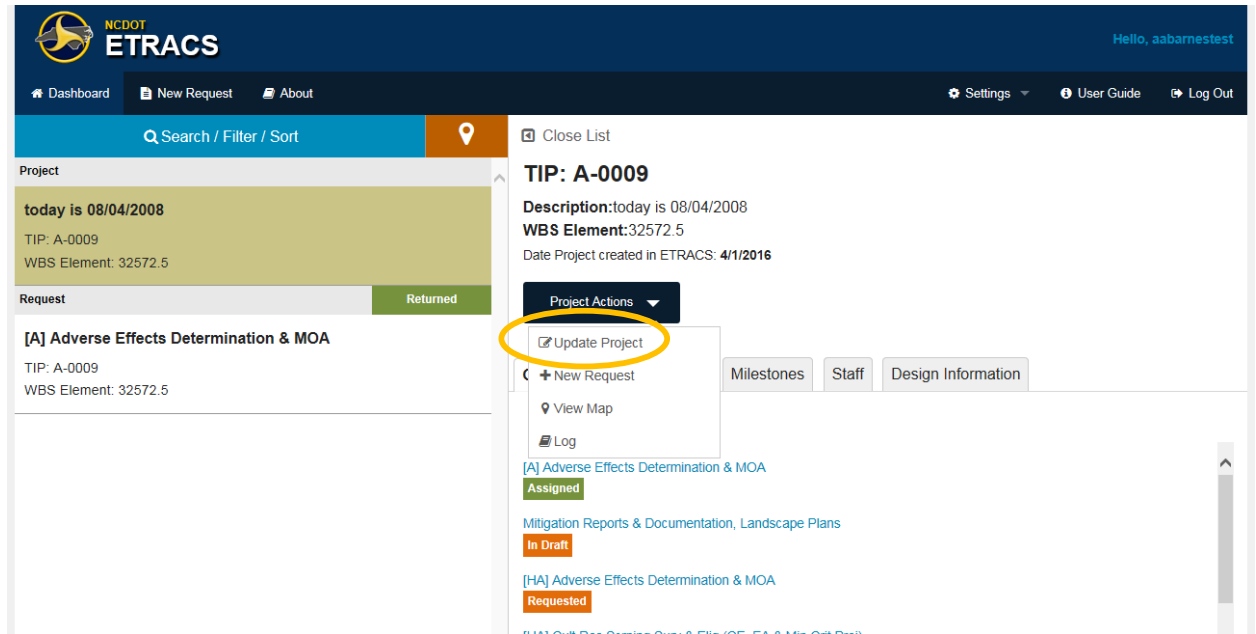
[View all notes](#)

WBS Element: 50010.1.1.3

5. Save your changes.

5.3.2 Update Project Information

1. If the request was returned due to missing or incorrect project information, the requestor must highlight the project, and update the project information using Update Project from the Project Actions menu.



User Tip: Only the requestor(s) on the project can update project information.

5.3.3 Submit the Revised Request (for the requestor)

1. If the proposed date and all other information are now acceptable:

The Requester can proceed to resubmit the request by choosing View/Update Request from the Request Actions menu. Change the status to Requested. Save the change.

View/Update Request

TIP: A-0009 | Sub-TIP: N/A | WBS: 32572.5

Request Details | Milestones | Internal Details

Status

Returned

Request details

Requested by:
Alice Barnes on 4/1/2016

Proposed Revised Due Date:
9/21/2016

Original Due Date: *
4/21/2016

Submitted to:
Arch Supervisor, Ecap Supervisor

Assigned to:
Alice Barnes

Actual Completion Date:

Revised Due Date:

Please allow a lead time of 6 Months

Deliverables

Finding of Adverse Effects

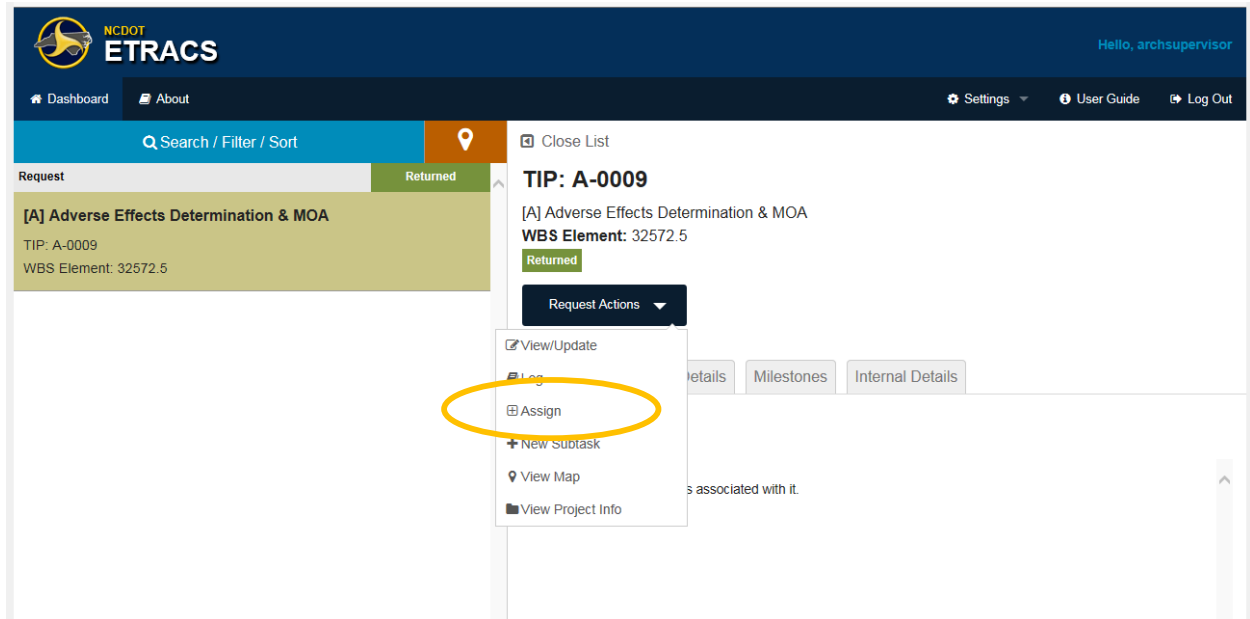
Add document path

NOTE: The Supervisor can proceed to reassign the request. See section 5.3.4 Reassign the Request (for the supervisor).

5.3.4 Reassign the Request (for the supervisor)

After checking the date and other information, and making any changes that you need to make (see section 5.3.1 “Negotiate / Change the Due Date or Information”):

1. With the request highlighted on the left-hand screen, choose **ASSIGN**.



2. Use the same process as in Section 4 Assign Request. You can assign the request back to the same person or to someone else.

Assign Request

TIP: A-0009 | Sub-TIP: N/A | WBS: 32572.5

Assign To

Select the person to assign this request to:

Scott, Thomas

Internal Due Date

Internal Due Date

Deliverables

- Finding of Adverse Effects
- Comments on Finding
- Draft MOA
- Comments on Draft MOA
- Final MOA

Add Additional Deliverables

+ Add Additional Deliverables

Internal Notes

Assign Request Cancel

WBS Element: 50010 1 1 3

3. The deliverable(s) that you already selected will be on the screen. If you need to add any deliverables, use the Add Additional Deliverables function as many times as you need to add the name(s) of the deliverable(s).

Assign Request

TIP: A-0009 | Sub-TIP: N/A | WBS: 32572.5

Assign To

Select the person to assign this request to:

Scott, Thomas

Internal Due Date

Internal Due Date

Deliverables

- Finding of Adverse Effects
- Comments on Finding
- Draft MOA
- Comments on Draft MOA
- Final MOA

Add Additional Deliverables

[+ Add Additional Deliverables](#)

Internal Notes

[Assign Request](#) [Cancel](#)

WBS Element: 50010 1 1 3

4. Click Assign Request.

Assign Request

TIP: A-0009 | Sub-TIP: N/A | WBS: 32572.5

Assign To
Select the person to assign this request to:
Scott, Thomas

Internal Due Date
Internal Due Date

Deliverables
Finding of Adverse Effects
Comments on Finding
Draft MOA
Comments on Draft MOA
Final MOA

Add Additional Deliverables

[+ Add Additional Deliverables](#)

Internal Notes

[Assign Request](#) [Cancel](#)

WBS Element: 50010 1 1 3

5.3.5 Delete the Request (for the requestor)

1. To delete a request, use the Delete Request under Request Actions.

The screenshot displays the ETRACS web application interface. On the left, a list of requests is shown, including 'Certificate of Appropriateness (COA)', 'Effects Assessment', '[A] Cult Res PA Scrnng & Surv (CE, EA & Min Crit Proj)', and '[A] Adverse Effects Determination & MOA'. The 'Effects Assessment' request is highlighted. On the right, the details for 'TIP: I-5110' are shown, including 'Effects Assessment' and 'WBS Element: 42345.3'. The 'Request Actions' dropdown menu is open, and the 'Delete Request' option is circled in yellow. Other options in the menu include 'Return', 'View/Update', 'Log', 'Assign', 'View Map', and 'View Project Info'. The right sidebar shows 'Submitted to: EnginEeringManagertwo', 'Assigned to: Unassigned', and 'Revised Due Date: 12/16/2015'.

The system will prompt you:

The screenshot shows a 'Delete Request' confirmation dialog box. The dialog box has a title bar that says 'Delete Request'. Inside, it asks 'Are you sure you want to delete this request?'. There are two buttons: 'Delete Request' and 'Cancel'.

2. You can confirm or cancel.

5.4 Update / Complete Request – For Specialists and Supervisors

During the lifecycle of a request, while it is IN PROGRESS, there will be multiple times that the supervisor and specialist will add detail, as well as producing and reviewing deliverables. A request may be in ETRACS for a very long time. There will be multiple opportunities and requirements to update the request. This section of the Users' Guide will show all the possible fields for updating, but you will not do these all at the same time, but rather at different times during the project. The following functions are explained below:

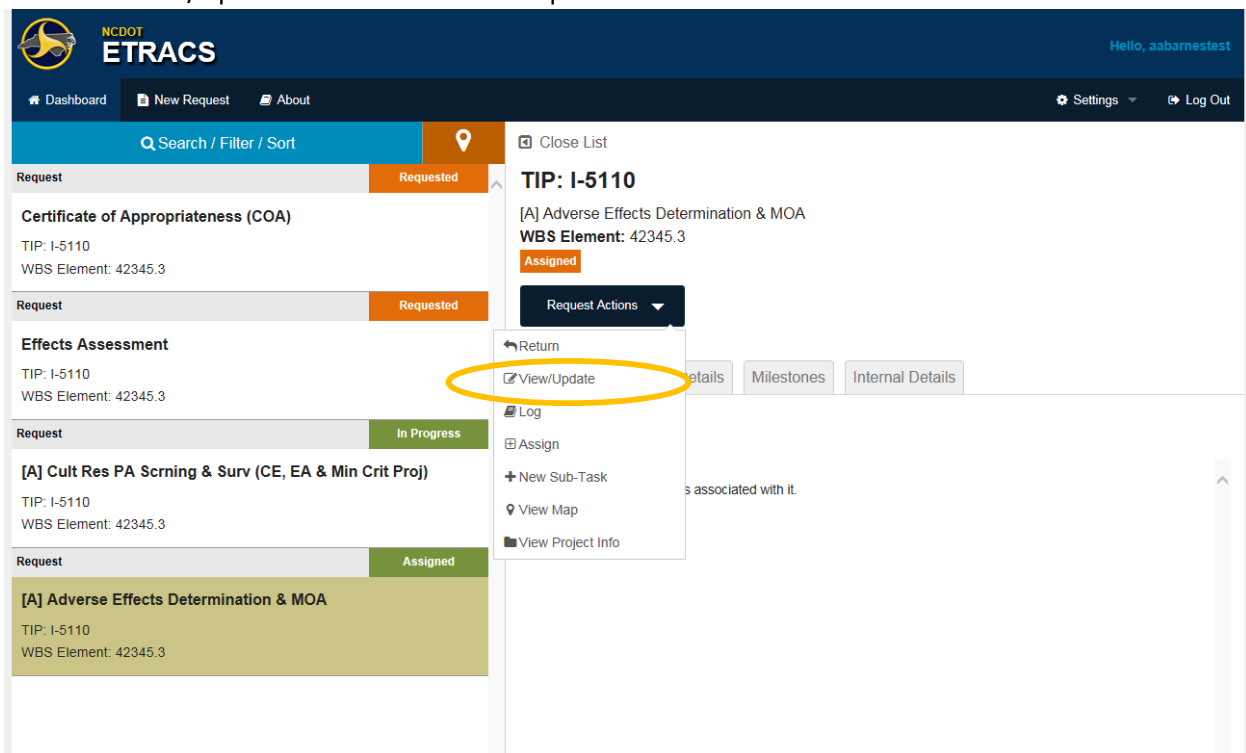
- Updating Request Details
- Updating Internal Details
- Updating Milestones

5.4.1 Updating Request Details

All requests have a common tab called Request Details. This tab contains all of the basic data tracked for every request, regardless of the group or request type. Some of this data will be tracked automatically by ETRACS. Other data can be updated by specialists and supervisors.

User Tip: The choices available for editing are dependent upon your ROLE and your permissions.

1. Select the View/Update function from the Request Actions menu.



2. To move requests to another status, choose the dropdown. For example, when a request is complete, the specialist or supervisor can change the status from In Progress to Completed.

The screenshot shows a 'View/Update Request' dialog box with three tabs: 'Request Details', 'Milestones', and 'Internal Details'. The 'Request Details' tab is active. At the top right, it displays 'TIP: A-0009 | Sub-TIP: N/A | WBS: 32572.5'. Below the tabs, there is a 'Status' dropdown menu, which is highlighted with a yellow circle. The dropdown menu shows three options: 'In Progress' (selected), 'Completed', and 'On Hold'. Below the status dropdown, the 'Request details' section contains the following information:

Requested by: Alice Barnes on 4/1/2016	Submitted to: Arch Supervisor, Ecap Supervisor
Proposed Revised Due Date:	Assigned to: Arch Intspecialist
Original Due Date: * 4/23/2016	Actual Completion Date:
	Revised Due Date: <input type="text"/>

Below the request details, there is a 'Deliverables' section with a text input field containing 'Site Survey and Evaluation Draft Report' and a button 'Add document path'. At the bottom of the dialog, there are two buttons: 'Save' and 'Cancel'.

3. Scroll down to add deliverable paths when the deliverables have been completed. The deliverables you see listed will generally be the ones that have been requested. You can also add deliverables.

The screenshot shows the 'View/Update Request' window with the 'Request Details' tab selected. The 'Deliverables' section is highlighted with a yellow circle. It contains a list of deliverables with corresponding 'Add document path' buttons. Below the list, there is a 'Document Name' input field, an 'Add document path' input field, and a blue minus icon. At the bottom, there is a link to 'Add Additional Deliverables'.

Deliverables	Action
Site Survey and Evaluation Draft Report	Add document path
Archaeological Site Forms	Add document path
Site Survey and Evaluation Final Report	Add document path
GIS files	Add document path
Curated Artifacts	Add document path
Archaeological Site Forms	Add document path

Document Name:

Add document path:

[Add Additional Deliverables](#)

4. Scroll down again to add Documents or Notes.

The screenshot shows the 'View/Update Request' interface in the ETRACS system. The browser address bar indicates the URL: <https://appst.ncdot.gov/PDEA/ETRACS/HES/Dashboard/Index>. The page title is 'View/Update Request'. The breadcrumb trail shows: PDEA Tracking Upgrade > Project Center > ETRACS > UAS site > EPMO > Transportation Portfolio > NCDOT Workplace > DocuSign > NEU Data Warehouse > Training Materials.

The form has three tabs: 'Request Details' (selected), 'Milestones', and 'Internal Details'. The 'Request Details' tab shows the following information:

- TIP: A-0009 | Sub-TIP: N/A | WBS: 32572.5
- Documents** section (highlighted with a yellow circle):
 - Agency Input Letters: Add document path
 - Current Design Files*: asdf
 - Aerial Photography Study Area: Add document path
 - Document Name: [text input]
 - Add document path: [text input] [minus icon]
 - + Add Additional Document
- Notes** section (highlighted with a yellow circle):
 - Add a note: [text area]
- Buttons: Save, Cancel

5. Save your changes.

View/Update Request

TIP: A-0009 | Sub-TIP: N/A | WBS: 32572.5

Request Details | Milestones | Internal Details

Documents

Agency Input Letters

Current Design Files*

Aerial Photography Study Area

[Add Additional Document](#)

Notes

Add a note

5.4.2 Updating Internal Details

The Internal Details screen has been developed just for your groups to contain the things that you need. Wherever there is an Internal Details tab, it will contain the information that needs to be tracked uniquely for that request type.

6. Select the View/Update function from the Request Actions.

The screenshot displays the ETRACS application interface. The top navigation bar includes the NCDOT logo, the text "ETRACS", and a user greeting "Hello, aabarnestest". Below this, there are links for "Dashboard", "New Request", and "About". A search bar with the text "Search / Filter / Sort" is also present. The main content area shows a list of requests. The first request is "Certificate of Appropriateness (COA)" with TIP: I-5110 and WBS Element: 42345.3, marked as "Requested". The second request is "Effects Assessment" with the same TIP and WBS Element, also marked as "Requested". The third request is "[A] Cult Res PA Scrning & Surv (CE, EA & Min Crit Proj)" with TIP: I-5110 and WBS Element: 42345.3, marked as "In Progress". The fourth request is "[A] Adverse Effects Determination & MOA" with TIP: I-5110 and WBS Element: 42345.3, marked as "Assigned". A "Request Actions" dropdown menu is open for the "Assigned" request, showing options: "Return", "View/Update" (highlighted with a yellow circle), "Log", "Assign", "New Sub-Task", "View Map", and "View Project Info". The right side of the screen shows a detailed view of the selected request, including tabs for "Details", "Milestones", and "Internal Details".

7. Click on Internal Details.

On the View/Update screen you may view and/or enter all of the information for the request (depending upon your role). These screens may be quite large, so use the scroll bars and the possibly-multiple levels of expansion arrows to navigate.

The screenshot shows the 'View/Update Request' form with the 'Internal Details' tab selected. The form is titled 'View/Update Request' and includes a close button (X) in the top right corner. The top right corner also displays 'TIP: I-5110 | Sub-TIP: I-5110 | WBS: 42345.3'. The form has three tabs: 'Request Details', 'Milestones', and 'Internal Details'. The 'Internal Details' tab is active, showing a section for 'Internal Due Date' with a text input field. Below this is a section for 'Archaeology' with a dark header bar and an upward arrow icon circled in yellow. The 'Archaeology' section is divided into three sub-sections: '1. Screening', '2. Survey', and '3. Eligibility'. The '1. Screening' section includes a 'Name of Archaeologist' text input field, a 'No survey' checkbox with a 'Date' input field, and a 'Survey Required' checkbox with a 'Date' input field. The '2. Survey' and '3. Eligibility' sections are currently collapsed. At the bottom of the form are 'Save' and 'Cancel' buttons. The bottom right corner of the window shows a zoom level of 100%.

8. When all of the work on the request has been completed, Use the Status field on the Request Details to mark it completed.

The screenshot shows the 'View/Update Request' interface. The 'Request Details' tab is active. The 'Status' dropdown is set to 'Completed'. The 'Request details' section includes the following information:

- Requested by:** Alice Barnes on 12/4/2015
- Proposed Revised Due Date:** Original Due Date: 12/31/2015
- Submitted to:** AliceBarnes
- Assigned to:** HesSpecialist
- Actual Completion Date:** (empty field)
- Revised Due Date:** (empty field)

A note at the bottom of the details section states: 'Please allow a lead time of 6 Months'. The 'Save' and 'Cancel' buttons are located at the bottom of the window.

9. Save your update(s).

5.4.3 Updating Milestones

Some requests will, upon completion, signal that a STaRS milestone has been completed for the project.

User Tip: ETRACS pulls a great deal of information out of STaRS (as shown in Section 3.1, Create Request – Step 1 Search and Retrieve Project Information). When you update a milestone in ETRACS, that date goes back into STaRS and shows the milestone complete on the date that you entered. Milestone completion is the only thing that ETRACS sends back into STaRS to be updated.

User Tip: In order to update a milestone on a project in ETRACS, the milestone must be setup in STaRS at the correct WBS level.

User Tip: The choices available to you for updating a milestone are dependent upon your role, your permissions, and your assignment on this request. Only on requests where you are the requestor, supervisor, or specialist can you use ETRACS to mark a milestone complete and record the date of completion.

1. Select Request Actions dropdown -> View/Update.

The screenshot displays the ETRACS application interface. On the left, a list of requests is shown, including 'Certificate of Appropriateness (COA)', 'Comprehensive Survey & Eligibility (EIS)', and '[HA] Adverse Effects Determination & MOA'. The 'Request' column indicates the status of each item, such as 'In Progress' or 'Completed'. On the right, a detailed view for 'TIP: A-0009' is shown, including the 'WBS Element: 32572.3.9'. A 'Request Actions' dropdown menu is open, with the 'View/Update' option highlighted by a yellow circle. Other options in the menu include 'Return', 'Log', 'New Subtask', 'View Map', and 'View Project Info'. The top navigation bar includes links for 'Dashboard', 'About', 'Settings', 'User Guide', and 'Log Out'.

2. Click on the Milestones tab. All of the milestones eligible for update are listed.

View/Update Request

TIP: A-0009 | Sub-TIP: N/A | WBS: 32572.3.9

Request Details | **Milestones** | Internal Details

Usage Number	Description	Basic Date	Actual Completion Date	
M0094	Historic Survey & Elig. (HIST)	5/27/2016	5/27/2016	<button>Update</button>

Save Cancel

- Click on the blue Update button to select the actual completion date for the milestone. The calendar closes.

View/Update Request

TIP: A-0009 | Sub-TIP: N/A | WBS: 32572.3.9

Request Details | **Milestones** | Internal Details

Usage Number	Description	Basic Date	Actual Completion Date
M0094	Historic Survey & Elig. (HIST)	5/27/2016	5/27/2016

Update Milestone

Enter the actual completion date for this milestone

April 2016

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

Save **Cancel**

4. Check the date and click on the blue OK button.

The screenshot shows a web application window titled "View/Update Request". It has three tabs: "Request Details", "Milestones", and "Internal Details". The "Milestones" tab is active, displaying a table with the following data:

Usage Number	Description	Basic Date	Actual Completion Date
M0116	Archaeology MOA (ARCH_MOA)	3/9/2016	3/9/2016

Below the table is a blue "Update" button. An "Update Milestone" dialog box is open in the foreground, prompting the user to "Enter the actual completion date for this milestone". The date "04/18/2016" is entered in the text field. The dialog box has "Ok" and "Cancel" buttons.

You will see a brief message that your request was updated successfully and you will be returned to your dashboard.

5.5 Return an Incomplete or Unacceptable Request – For Requestor or Supervisor

In addition to the purposes outlined in Section 5.2 “Return Request,” there may be instances where a specialist (an internal employee or external consultant) incorrectly marks a Request as Completed. For example, when it comes back to the supervisor and/or requestor:

- The work may be deemed incomplete
- The deliverable may be unacceptable
- There could be another reason that it should not be marked complete.

In that case, the requestor or the supervisor should:

1. Select Request Actions dropdown -> Return Request.
2. Return it to the specialist OR choose to send to send the request to another person to complete.
3. Fill in the Reason for Return box to communicate the deficiencies.

5.6 View a Project and/or Request – For All Users

Depending upon your role, you will be able to view information on projects and requests. If you have a role on the project/request, you will have the options documented above. If you do not have a role on the project/request, you may still view the information that is in the system.

1. For **project** information, on the dashboard, highlight the project. The right panel shows the project information. Its Overview tab has a clickable list of the requests and subtasks.

2. For request information, highlight the request. The right panel shows the basic request information. For some request types, there is too much information to display. In those cases, choose the Request Action -> View/Update. This will allow a view of all the request information.

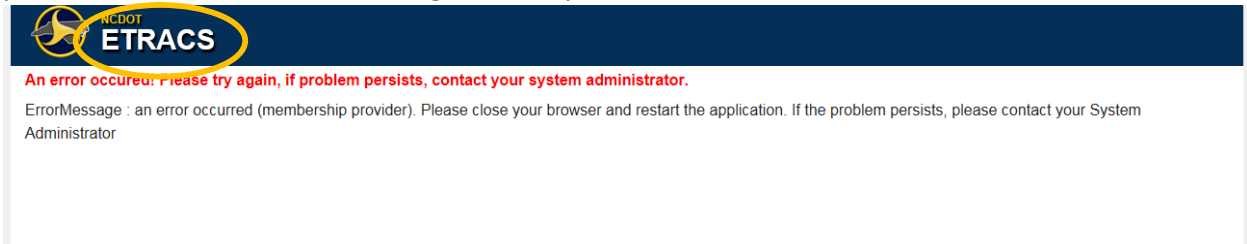
6 Troubleshooting

6.1 Problem: I can't get logged on.

1. Are you using your NCID and password? If you don't know your password, or if you think it has expired, check NCID and make the correction needed.

6.2 Problem: I see an error when I try to launch ETRACS

1. If you see the error shown below, you could launch a new browser session (as the message says). However, the problem is actually with the cache. The easiest way to correct this common problem is to click on the ETRACS logo in the top left-hand corner.



2. If you can't solve the problem, contact your System Administrator.

6.3 Problem: I cannot do one or more tasks that I'm supposed to do

2. Contact your ETRACS Administrator (NES or HES) to check your role and the groups you are assigned to. You must have the correct role(s) **AND** you must be a member of the group whose request you are working on. You can (and will) have multiple roles, based upon the work you do.

6.4 Problem: I can view but cannot edit the Internal Details

1. Contact your ETRACS Administrator (HES or NES) to be sure your role is setup correctly. You should be a supervisor and/or specialist, **AND** you must be a member of the group whose request you are working on.
2. Check the Status of the request. Make sure it's in the right status for working on Internal Details.
 - If it is REQUESTED, it is a new request that must be assigned by the supervisor.
 - If it is RETURNED, it must be submitted or assigned (depending upon where it is in the workflow).
 - If it is IN PROGRESS, the specialist can work on it.
 - If it is COMPLETED, it must be returned to a specialist to be worked on.
3. Look at the Request Details to ensure that you are listed under ASSIGNED TO.

6.5 Problem: the project information is not what I expected to find

1. Remember that ETRACS considers the **PROJECT** to be the level of information that exists in STaRS with the unique combination of TIP, Sub-TIP, and WBS ... not just the TIP number. On most screens you can check at the top of the right-hand panel and find the project.
2. If you have the wrong project, just cancel out (or use the Dashboard button) to start over.
3. If the project has more detail than you expected, it could be that other people have added project detail. On the dashboard, highlight the project and look at the right-hand panel to see when the project was created in ETRACS.
4. If you can't solve the problem, contact your System Administrator.

6.6 Problem: I cannot see the document when I click on the link

1. Check to be sure you are using Internet Explorer (IE) for your browser. Security features on other browsers will prohibit viewing documents on Project Store.
2. If you still can't see it, the path was probably put into ETRACS incorrectly. If you know who attached it, contract them to see whether they can fix it.
3. If you can't solve the problem, contact your System Administrator.

7 Reference

7.1.1 Request Status Values

Request Status Name	Active/ Inactive	Status Description
Requested	Active	Requestor submits new request for NES and HES Can be deleted by Requestor. Can be updated by Requestor.
In Draft	Inactive	Requestor saves the request that is not yet submitted Can be deleted by Requestor. Can be updated by Requestor.
In QC	Inactive	PPE Consultant submits the request to PPE for review and approval. Can be deleted by Requestor. Can be updated by Requestor.
Returned	Active	PPE returns the request submitted by PPE Consultant for review. Assigned To can Return to Requestor. Requestor Returns in Updated status to Assigned To Can be deleted by Requestor. Can be updated by Requestor.
Assigned	Active	NES/HES Supervisor assigns the request to the NES/HES Specialist (or themselves). Cannot be deleted. Can be updated by Submitted To user.
In Progress	Active	NES/HES Specialist begins work on the request Cannot be deleted. Can be updated by Submitted To and Assigned To users.
Pending Review	Active	Requested document for the request is pending a review. Cannot be deleted. Can be updated by Submitted To and Assigned To users.
Waiting HPO	Active	Cannot be deleted. Can be updated by Submitted To and Assigned To users.
On field	Active	NES/HES specialist indicates the field visit and provides the field visit dates Cannot be deleted. Can be updated by Submitted To and Assigned To users.
Completed	Inactive	NES/HES specialist completes the work or task for the request Cannot be deleted. Can be updated by Submitted To and Assigned To users.
Canceled	Inactive	Cannot be deleted. Can be updated by Submitted To and Assigned To users.